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A PHENOMENOLOGICAL EXAMINATION OF EXPATRIATE FAMILIES DURING
THEIR TRANSITIONS TO LIVING IN A FOREIGN COUNTRY

BY

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Submitted in partial fulfillment of the
Requirements of the Degree of Doctor of Philosophy
of the Department of Professional psychology and family therapy
Seton Hall University

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SETON HALL UNIVERSITY
COLLEGE OF EDUCATION AND HUMAN SERVICES
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Kwamia N. Rawls, has successfully defended and made the required modifications to the text of the doctoral dissertation for the **Ph.D.** during this **Spring Semester 2016**.

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ABSTRACT

A PHENOMENOLOGICAL EXAMINATION OF EXPATRIATE FAMILIES DURING THEIR TRANSITIONS TO LIVING IN A FOREIGN COUNTRY

For hundreds of years, people have traveled across land and sea for various employment opportunities. In the past, the majority of these moves have been taken by the worker alone, leaving their family members, spouse and children, behind in their country of origin. With the advancement of technology, the relative convenience of global transportation, and higher paying overseas jobs, many families are now able to accompany the member whose work has been posted over seas. Experiences of expatriate workers and their families, as they transition to living in a foreign country, is an important area of interest for companies, professionals, and families but has been often overlooked and understudied. Therefore, this study was intended to address that gap by examining the perceptions and experiences of expatriate workers *and* their families during a transition to living in a foreign country.

The following research questions guided this study: (a) How do expatriate families experience the transition to a foreign country?; and (b) How do expatriate families cope with the experience of transition to a foreign country? The research design was a qualitative approach to collecting detailed information, which characterized experiences of expatriate families' transition and coping with living in a foreign country.

The findings of this study indicated that experiences of expatriate families during their initial move and transition to a foreign environment are profoundly influenced by the variables of culture, residential/social community, husband-wife communication, family communication and family cohesion. In addition, expatriated families found that the presence of external supports through their multinational company (MNC) and greater expatriate community were crucial in

helping them forage and maintain a positive transition and post-transition “adaptation” to their foreign country-leading to a successful expatriate tenure.

Limitations, implications for future research, and recommendations for companies, future expatriate families and psychological professionals are discussed.

DEDICATION

To my best friend James and our three loves, Sebastian, Dorian and Paige. Thank you for supporting me to the top of the Matterhorn. Now that the flag is planted we can move forward...next... Mount Everest.

ACKNOWLEDGMENTS

Throughout my experience as a graduate student I have been fortunate to have encountered countless educational leaders, students, and environments. I truly believe there is always something to learn from all the people and places one encounters in life...one just has to be open to it. Although most will remain nameless, I thank each and all of these wonderful individuals, families, and places for their effect on my life and education. The impact of all of these has been vast, long lasting and invaluable.

Dr. Beitin, thank you for being my mentor. I cannot express how much your guidance and support has meant for me-especially early on in our “transition” together. It has been a long road and I am certain it would not have been completed without your encouragement. I thank you for sticking with me.

With great appreciation, I thank my committee: Drs. Brady-Amoon, Farrelly, and Foley. Thank you for challenging and guiding me through this process. This endeavor has taken a great deal of perseverance and determination and I am thankful for the journey and more thankful for all of your time and support seeing me through it.

Drs. Robert and Sharon Massey. I will forever be grateful for the depth of knowledge you both have possessed and unselfishly shared with me throughout the years. Dr. Robert you are deeply missed, more so now that this arduous part of my academic journey is done. Dr. Sharon, thank you for your unconditional support. You have been both a verbal and silent cheerleader during this process and I hope with its completion you are proud and we can share a proper tea and talk about anything and everything else.

Finally, I kindly thank the participants for sharing their time, personal stories and experiences with me. I was touched by each and every moment, each and every story, and

inspired by their generosity in furthering of my learning through the use of their own experiences.

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Chapter I

Introduction

This study explored the experiences of ten expatriate workers and their families as they transitioned and coped to living in a foreign country. Through the use of a qualitative, phenomenological research design, rich descriptive narratives were gathered detailing the expatriate family's experience of transition to their foreign country. The family narratives were reported from the perspective of the parental dyad (married couple) of the family system.

Study Rationale

A search of the existing literature revealed few studies examining the experience of transition to a foreign country among expatriate families. Of these, the focus has been on the adjustment of various individual family members such as spouses of expatriate workers (Caligiuri, Hyland, Joshi, & Bross 1998; Shaffer & Harrison, 1998), or of the teenager (Weeks, Weeks & Willis-Muller, 2010). A literature review found no qualitative studies that examined the impact of transitioning to a new country on families as an area of interest within the body of expatriate research. Some related studies regarding expatriate workers and family issues were identified (Caligiuri et al.; De Leon & McPartlin, 1995; Edwards & Rothbard, 2000). However, no empirical data were revealed regarding family constructs, and the findings were based on assumptions made from resulting anecdotal information.

This review of research uncovered primarily quantitative studies focused on workplace strain abroad (Jex, Beehr, & Roberts, 1992; Kahn & Byosiore, 1990; Kraimer & Wayne, 2004), expatriate worker selection (Anderson, 2005; Mendenhall, Dunbar, & Oddou, 1987), expatriate early departure (Garonzik, Brockner & Siegel, 2000; Brewster, 1988; and Tung, 1987), and a wide variety of other personnel/resource management issues (Aycan, 1997; Black, Mendenhall,

& Oddou, 1991; Brett & Stoh, 1995; Fontaine, 1989; Takeuchi, Wang & Marinova, 2005; Shaffer & Harrison, 1998; Shaffer, Harrison, & Gilley, 1999).

There are also studies that focused on spousal adjustment to living abroad and its effect on the expatriate worker's job performance (Black & Gregersen, 1991a; Black & Stephens, 1989; Shaffer & Harrison, 2001; Takeuchi, Yun, & Tesluk, 2002). Thus, it appears that there has been more focus on expatriate workers and job performance than on experiences of transition that the both worker and family navigate when moving to a new country and into a different culture.

The remainder of this chapter will highlight the problem area and the systemic theoretical considerations that prompted the need for examining the experiences of the expatriate family in transition to a foreign country. Terms important to the research will be defined, and a general understanding of the importance of this subject area will be presented.

Background Leading to Investigation of the Problem

Moving can be a difficult and taxing experience for any individual or family. The process involves confronting and making sense of many changing physical, social, and emotional variables. According to researchers (Holmes & Rahe, 1967; Pollack & Van Reken, 1999; Shaffer & Harrison, 1998), moving is one of life's most stressful events, along with job change/promotion and the death of a parent or sibling. Moving into a new culture, like any move, is inherently stressful. However, it is also accompanied by myriad complex and challenging feelings, thoughts and behaviors that are unique to this particular transition (Pollack & Van Reken, 1999). As one of life's major transitions, moving to a different country involves profound psychosocial, physical, and cultural adaptations (Pollack & Van Reken, 1999; Oberg, 1960).

Moving into a new culture challenges prior modes of adaptive functioning and often requires several complex adjustments for even simple tasks (O’Keeffe, 2003). For example, grocery shopping can be an adjustment with a challenging set of new variables to tackle. There may be new labels to read or to interpret. Such basic elements as continuity and security are interpreted and experienced differently based on the host culture.

Relocation can place significant demands on one’s ability to cope with ambiguity, including the unknown and change in multiple areas. Thus, there are many losses felt during relocation (Pollock & Van Reken, 1999). Some are painful, especially when both emotional and physical distances are great. Geographic relocation, even within the same culture can be stressful; families leave behind familiar neighborhoods, scenery, family members, friends, pets, familiar activities, recreation centers, religious centers, jobs, and schools. These losses can be experienced as particularly painful when one moves abroad, given that visiting such familiar places or at times even making contact with one’s usual support systems is not feasible. For example, telephone conversations with those in their country of origin can be difficult to arrange given time zone differences. These losses can be ambiguous and difficult to express, leaving individuals confused and unable to fully identify the sources of their grief (Boss, 1999). Additionally, family members, collectively and/or individually, may experience symptoms related to culture shock: denial, helplessness, anxiety, confusion, sadness, anger and irritability (Arthur & Bennett, 1995) as well as a loss of identity (Goodwin, 1999).

Culture shock occurs when individuals interact with members of a very different culture and experience a loss in the understanding of their social and behavioral environment (Triandis, 1994). This happens when they cannot understand the behavior or social cues of the people from the foreign culture. As a result, individuals feel confused and develop both physical (e.g.,

asthma, headaches) and psychological (e.g., depression, anxiety) symptoms (Oberg, 1960; Ward, Bochner, and Furnham, 2001). The literature has shown that these symptoms of culture shock are more likely experienced by expatriates who feel they do not have any control in the new environment; those who struggle to establish close relationships with host nationals; and those with no previous international experience (Holopainen & Björkman, 2005). Furthermore, experiencing culture shock can exacerbate maladjustment to the host culture impacting both job performance and satisfaction. Thus, some expatriates who experience culture shock and do not adjust well to the host culture, might depart prematurely (Black & Stephens, 1989; Tung, 1982), while others may remain on the assignment but demonstrate poor job performance due to dysfunctional adjustment secondary to culture shock (Kraimer, Wayne & Jaworski, 2001; Shaffer, Harrison, Gregersen, Black & Ferzandi, 2006).

Acknowledgment that the move into a new culture involves several tasks and subsequent adjustments is a first step for families that make such a move and for professionals who may assist them in relocation and/or adjusting to multiple changes (Albright, Chu, & Austin, 1993). Professionals, who help expatriate families adapt, need to recognize that circumstances vary from one move to another and indeed from one person to another. Contexts that appear similar on the surface are not experienced the same by all individuals. Simply put, international relocation can vary across many different internal and external dimensions (Pollack & Van Reken, 1999; Shay & Baack, 2004). These mediating dimensions include a range of issues that should be considered prior to such a move. These include individuals' characteristics (e.g., age, gender, personality, and presence of preexisting social/physical/mental problems), family characteristics (e.g., family size, family structure, developmental stage of the family and of each of the individuals composing it, family attitudes about moving, availability of parents to the

children, and issues related to extended family members), community characteristics in the new location (e.g., access to social supports, availability of resources and programs to address the needs and concerns of newcomers, and the economics of a new environment) and mobility characteristics (e.g., distance of move, timing of transfer, reason for relocation, degree of choice in the move, and cultural and geographic differences between countries) (Albright et al., 1993; Pollack & Van Reken, 1999; Shay & Baack, 2004).

Early studies of international relocation tended to link the process with various social and psychiatric problems (Landau, 1982; Thrasher & Anderson, 1988; Turner, 1991). However, there is little scientific evidence to validate the widely held belief that an international move has any long-term negative impact on most people (Arthur & Bennett, 1995; Pollack & Van Reken 1999). Therefore, one can expect that individuals who are well adjusted before a move will be well adjusted after a move, whereas those with preexisting social and/or emotional challenges will be at risk for similar or even greater difficulties after a cross-cultural move (Garonzik, et al., 2000).

Although extensive literature exists regarding the stressful aspects of international relocation, there are positive aspects as well. Exposure to different and intriguing cultures, travel, diverse educational and cultural learning experiences, and the expansion of one's international support network are just a few of the positive opportunities associated with an international relocation. Thus, international relocation can have both positive and negative effects on individuals and their families (Van der Zee & Salome', 2005; Zhu, Luthans, Chew, & Li, 2006). The transition generally involves some combination of growth and struggle within families (Church, 1982). Regardless, it is important to keep in mind that for some individuals, moving into a new culture can be associated with greater or lesser states of anger, anxiety,

acting-out, withdrawal, distress, or other stress-related reactions such as depression, over/under eating, hives, substance abuse and marital and familial conflicts (Oberg, 1960; O’Keeffe, 2003; Triandis, 1994). During these transitions early intervention from qualified professionals may prove beneficial to having a more positive relocation transition in the long run. This may be particularly true for family units in the early months of transition to a new culture when they first encounter many new challenges.

Significance of the Study

Most current and historical research on expatriate life has been focused on management policies, procedures, and selection and efficacy of expatriate workers (Anderson, 2005; Harvey & Novicevic, 2001; Mendenhall & Macomber, 1997; Scullion, 1991; Takeuchi et al., 2005). Another popular area for research has been spousal adjustment issues and how these affect the working conditions and performance of an expatriate worker (Caligiuri et. al., 1998; Shaffer & Harrison, 1998; Takeuchi et. al., 2002).

Notably, there is a lack of research focused on expatriate familial experiences without emphasis on a relocated worker’s job performance. This is ironic given that the 2011 Global Relocation Trends Survey estimates that 47% of the documented expatriate workers reported having family (e.g., spouse, children, pets) that relocate along with them. This is in contrast to historical examples of expatriate employees and immigrants who would sojourned in a different country for long periods of time, sometimes for years, without their spouses and children (Furnham & Bochner, 1986). Some would leave their families behind due to lack of resources (e.g., money), risk (e.g. what if this job does not work out and we have to move again?), or home obligations (e.g. the spouse must stay to take care of extended family members, children, job responsibilities). Such experiences have taken their tolls on family units, often resulting in

conflicts, behavioral and emotional problems in family members, marital conflicts, formal separations, divorce, and a dismantling of the entire familial unit (Singham, 1990; Turner 1991).

With the advancement of technology, relative convenience of global transportation, and higher paying overseas jobs, many families are now able to accompany the family member whose work has been posted overseas. It is positive that more and more families are able to remain together physically and to make such moves globally that were once not possible. This is clearly an advance in terms of preserving the family structure despite a major geographical relocation of the family. However, apart from making it physically possible to keep such families together and the aforementioned focus on identifying spousal issues that may affect job performance, not much else has been highlighted or discussed in the literature regarding the experience of the expatriate family.

Though a family now is able to move together, they must also be able to make a transition together. It is estimated that the cost of an early return of overseas personnel is at least 2.5 times an employee's yearly salary (Ory, Simons, & Verhulst, 1991; Shannonhouse, 1996). From this point of view, one can understand the preponderance of literature and research focused on the job success and failure of employees who are posted abroad. However, many companies neglect the importance of factors associated with moving abroad that such employees and their families must endure. These include the transition process as experienced by the entire family, collectively and individually. Wives, husbands, partners, children, pets, extended family members and at times child-care personnel must negotiate numerous changes individually and together when transitioning to a new cultural environment. These transitional issues include health and healthcare concerns, safety concerns, temporary loss of old and building of new support systems and pre-existing familial problems. There is an absence of studies to examine

such problems. Not enough is being done to adequately prepare transferred workers and families for making the big transitions that such a move involves. This is surprising, given the great costs companies incur to send employees and their families overseas (Garonzik et al., 2000; Ory et al., 1991; Shannonhouse, 1996). It is especially surprising, given the number of articles focused on examining spousal adjustment to a new context and the effects on job performances of expatriate workers (Black & Gregersen, 1991; Black & Stephens, 1989; Shaffer & Harrison, 2001; Takeuchi, et al., 2002).

The importance of expatriate spouses on the wage-earner's job success before and during the international assignment has been well documented (Takeuchi et al., 2005; Takeuchi et al., 2002). However, little attention has been given to highlighting specifically what factors are most important for expatriate workers' spouses or what variables are important for facilitating expatriate families' successful transitions to new cultures. In terms of cross-cultural adjustment, it is well established that, when the family functions cohesively, adjustment issues are negotiated more easily and there is less marital conflict and fewer child behavioral and emotional issues (Arthur & Bennett, 1995; Furnham & Bocher, 1986; Singham, 1990; Turner, 1991). Therefore, there is significant need to uncover and make known the factors that are most important in the transitions of these families.

One implication of the current research is that services that promote expatriates' well being can be identified and promoted. This will be a huge benefit to companies and families in light of the large and increasing numbers of couples and families who are expatriates. Another significant reason to examine the needs of this population involves the costs, financially and socially, to both the expatriate family and the multinational companies (MNC's) (Anderson, 2005; Shaffer, Harrison, Gilley, & Luka 2001). Both must take considerable financial risk.

Spouses of expatriate workers are often forced to sacrifice or postpone employment and educational opportunities and live in economic conditions that are vastly different than their country of origin. MNC's spend a great deal of money sending the expatriate and family abroad, in terms of travel/relocation, housing, schooling, and other costs incurred in such transfers (Caligiuri et al., 1998). The social risks are also great and include, for the family, the risks of not fitting in abroad and not fitting in upon return to their country of origin, lapse in work-specific resume or applicable work related to the spouse's profession, lack of privacy, and social isolation. For the MNC's, there are risks as well. If the companies experience a high turnover and/or repeated problems associated with the expatriates they employ, they risk ruining their reputation with the countries in which they are located and may suffer a subsequent loss of business (Zeira & Banai, 1985).

Definitions of Terms

Before continuing an exploration and review of the literature regarding expatriate families and transition, there is a need to define some terms that will be used through the remainder of this chapter and the rest of the study. The following terms are consistent with the definitions that are widely used and referred to within existing expatriate literature (Anderson, 2005; Caligiuri, et al., 1998; Polluck, 1999; Weeks, Weeks & Willis, 2010):

Expatriate: A person who has been relocated has been relocated from their country of origin to a company site in a foreign country. Sometimes, in casual conversation, one might refer colloquially to an expatriate as an "expat". This term is not applicable to persons who have relocated themselves due to dissatisfaction with conditions "at home" nor to persons expelled by their home countries.

Expatriate Family: Couples with one or more children in which one or both parents' work locations have been relocated by their companies to a company site in a foreign country.

Expatriate Worker: A parent whose job has been relocated from the country of origin to a foreign company site.

Expatriate Spouse: The spouse of an expatriate worker, who does not work for the company that relocated the worker and family abroad.

Foreign: A country other than the worker's and family's country of origin.

Host Country: A foreign country to which the expatriate family has been relocated for work purposes.

Expatriate transition: The process the expatriate family goes through in adjusting to a host country.

Researcher Perspective

It is important to consider the influence of family systems theory as it relates to this research study. The guiding perspective of the researcher is a basic understanding of family systems theory, which will enable an appropriate examination and understanding of the contexts of the participants and their families during their expatriate experiences. Family systems theory is a body of knowledge that has risen out of the observations and work with individuals and their families from clinical and counseling professionals for over 60 years. The theory suggests that individuals cannot be understood in isolation from one another. Families are systems of interconnected and interdependent individuals, none of whom can be understood in isolation from the system since all parts are connected and influence or are impacted by one another.

System, or family dysfunction can often be seen when the system experiences changes also known as transitions. These transitions can come in the form of social, emotional, or even

physical changes for family members or within their environment. For example, an expatriate family moves to a foreign country and the wife/mother must give up her full time job and take up more at-home responsibilities to support her family in the move, while her husband increases his time and responsibilities at his new job abroad. The change in roles may maintain the stability in the relationship, but it may also push the family towards a different equilibrium. This new equilibrium may lead to dysfunction as the wife or husband or children may not be able to maintain this *new* role over a long period of time.

Observing individuals of a family from a systemic perspective during this period of transition will allow this research study to consider and examine the social, emotional, physical and environmental transitions expatriate families experience and how they cope with these transitions. This systemic perspective is one unique part of this current research where past expatriate research has lacked in its examination of the experiences and needs of the expatriate worker in transition.

Research Questions

The research questions for this qualitative study were as follows:

1. How do expatriate families experience the transition to a foreign country?
2. How do expatriate families cope with the experience of transition to a foreign country?

Because there are numerous corporations that regularly post some workers overseas and various cities that have sizeable populations of expatriate workers and their families, it is relatively easy to locate clusters of expatriate families who are often from varied ethnic, cultural and national backgrounds. The intent of this study was to develop a rich description of the nature of the expatriate experience and to uncover factors that make the transition more or less successful for the worker, the spouse, the children and the family as a whole. Additionally, it

was hoped that a general understanding of how a family copes with such a transition would be revealed. The researcher sought to uncover the important factors faced by expatriates in transition. By hearing and examining the narratives of expatriate workers and their spouses regarding their transition experiences, the researcher expected to bring awareness to the factors that are most common and experienced as most important amongst expatriates in the early months of transition to a new culture.

As a result of this study, information from the perspective of the couple, full of rich details and factors was identified regarding the expatriate family's experience as they transition to a foreign environment. The following chapter will review and summarize the literature related to expatriates workers and families in an exploration of what may be the most significant factors that affect expatriate families as they make the transition to living in a foreign country.

Chapter II

Literature Review

There is no official record of the number of employees who are stationed outside of their home country. In 1997, Shepard estimated that at least 1.3 million expatriates were employed with American multinational corporations. However, this number does not accurately reflect the number of individuals on such assignments. According to previous research, it is estimated that 80% of all expatriate personnel were married and that over 30% had children aged 14 or younger accompanying them (Black & Gregersen (1991); Naumann, 1993).

According to the 2011 Global Relocation Trends Survey, approximately 68% of documented expatriate workers worldwide were married. Of this 68%, 80% had spouses accompany them on their expatriate assignment. Approximately 47% of the expatriate population reported having spouse and children accompanying them on assignment. Thus, the number increases to over an additional one million spouses and a truly unknown number of children also taken abroad. It should be further noted that these numbers do not include those individuals and families who work for the diplomatic and military services, inter-governmental exchange programs, educational institutions, religious organizations, and/or other non-government sector or private organizations and businesses.

This is a significant number of people, with the potential to affect and impact many facets of everyday life for a great number of persons around the world, especially for families who do not adjust well during the assignment. Better understanding of the transitions that such family units go through can help to identify possible resources that can aid in their achieving a smoother transition and more successful outcomes both at home and at the workplace. The following

literature review will examine the most pertinent research related to the experiences of the expatriate family and their transitions to living abroad.

Expatriate Selection

A decision to relocate a family to a foreign country because of a work opportunity is not a decision taken lightly. Expatriates and their spouses usually take a considerable amount of time making the decision to move overseas before they publically embrace the opportunity (Polluck & Van Reken, 1999).

For a company, a significant decision and commitment is required. The cost of an international manager can be three times the salary of a U.S. executive (Maertz, Hassan & Magnusson, 2009; Wederspahn, 1992). In the last 5 years, due to economic shifts in the U.S. and global markets, MNC's are becoming even more selective with the workers they send abroad (Global Survey Research, 2011). Most companies are choosing to send fewer workers abroad, hoping for better retention (less expatriate failure) and better return on their investment. Thus, the selection process has become even more complex when considering the employee most suitable for an assignment abroad. This is why companies can benefit from research regarding the experience of expatriate families. Knowing more about the experience of expatriate families will enable companies to make better decisions with whom they choose to send abroad. Such research will prepare both the company and the potential family with valuable information on what to expect, what supports may be needed and what areas or potential strengths and weaknesses to examine before sending an entire family abroad. Providing the necessary supports to an expatriate and his or her family has the potential to save the company and employee time, money and unneeded additional stress.

A recent literature review reveals many articles focused on expatriate worker selection (Anderson, 2005; Mendenhall, et al., 1987; Selmer, 2001; Stone, 1991; Stone, 1986). However, the scant attention paid to accompanying family members in the selection process for expatriate work hires is widely documented throughout the literature (Haslberger & Brewster, 2008; Mendenhall, et al., 1987; Overman, 1992; Punnett, 1997; Stone, 1986; Tung, 1982). In 1993, an anonymous author published an article in the journal, *Personnel Management*, quoting the director of the Centre for European Human Resource Management regarding the problems of recruitment and retention of expatriate workers. The director is quoted as saying that “despite our knowledge that family problems are among the major reasons for expatriate failure, companies very rarely take account of the family in the selection process”.

Research presented by Smith and Still indicated that only 39 percent of Australian, female-expatriate respondents reported that a spouse had been part of the formal selection process for an international assignment (Anderson, 2005). Previous, related research carried out by Tung (1982) in the USA and Enderwick and Hodgson (1993) in New Zealand also indicates a lack of inclusion and consideration of the expatriate worker’s family in an international relocation. The failure of companies to realize that an overseas assignment involves the whole family, as reflected by the presented research, is perhaps one of the greatest weaknesses in the expatriate selection process. Stone (1986) contends that omitting spouses and children from the process might be one of the biggest precipitating factors of expatriate failure. Thus, companies are being encouraged by human resource management to include spouses in pre-departure training for work related international relocation (Shaffer & Harrison, 2001). However, the inclusion of the entire family, children and spouses, in the selection and decision making process has been neglected by both researchers and companies (Zhu, et al., 2006).

Expatriate Worker, Spouse and Family Adjustment

When an expatriate worker relocates with his/her family, satisfaction and work achievement in the host country is not only based on the individual worker's transition and subsequent adjustment but their family's experience in these domains as well. When considering the expatriate population, there is a lack of research, which specifically examines how non-work stress and family transitional factors influence the expatriate's adjustment to their international work assignment. Haslberger and Brewster (2008) reviewed and explored some of the existing literature regarding the adjustment of expatriate families to living abroad and suggested that more specific family focused studies are needed concerning expatriates.

International assignments present a unique dilemma for expatriate workers and their families in terms of cross-cultural adjustment. The acceptance of a job assignment in a foreign country not only involves adjustments to differences in the work environment but also adjustments to differences to the international experience outside of work (Black, et. al., 1991). Thus, the literature is focused on individuals within a family context yet there are no studies that examined experiences through a systemic context of an entire family. Therefore a limitation within the expatriate literature is the absence of information about the entire family's experience during international assignments and, in particular, information regarding the multiple adjustments that the worker and family will encounter and need to overcome.

Life is full of transitions or changes. Some of these are expected while others are not. Whether it is a birthday or a move, every transition changes something in our lives. For expatriate families, part of change, within an international relocation, is cultural adjustment. Adjustment occurs when one must modify their behavior in response to a transition. Adjustments for expatriate families will occur within the context of changing constructs (Pollock

& Van Reken, 1999). The process of adjustment is complex. Black defines cross-cultural adjustment as “the degree of psychological comfort and familiarity that the individual has for the new environment” (1990, p.111).

The process in which an individual or a family adjusts to another culture is multidimensional. Black, Gregersen, Mendenhall, and Stroh (1999) suggest the process consists of three main focal areas. These three areas are 1) the general living environment in the foreign context, 2) the work environment, and 3) interactional situations and norms. The first area, the general living environment, consists of the individual’s or family’s psychological comfort, familiarity, and ease of adjustment to everyday circumstances like food, weather, and living conditions. The second area is the work environment and addresses the degree of psychological comfort regarding various aspects of the work environment like managing different work level relationships. The third area is the interactional situations and norms in the process of the individual’s psychological comfort regarding interpersonal communication differences that occur in non-work social contexts. For example, this would occur when family members socialize with the host country nationals or expatriates from other countries.

The lack of research that includes partners and children on the expatriate experience has been noted by several sources (Davidson & Kinzel, 1995; De Lion & MacPartlin, 1995; DeCieri, et al., 1991; Reynolds & Bennett, 1991.). However, some researchers have found that the presence of children during expatriation is more likely to place additional demands on resources and subsequently increase, workplace strain, and expatriate failure (Edwards & Rothbard, 2000; Guzzo, Noonan, & Elron, 1994; Shaffer & Harrison, 1998).

Adjusting to cross cultural variables has been shown to place a great amount of stress on the expatriate worker (Black, Gregerson, Mendenhall, & Stroh 1999; Thompson, 1986;

Hechanova, Beehr, & Christiansen, 2003). Such variables include language, traditions and practices of the host country, dress, food, religious practices and even gestures and body language. Although no specific studies were found that specifically examined these challenges for the entire expatriate family, there were studies that suggested that the family would be challenged similarly by these cross cultural factors (Mendenhall & Oddou, 1985; Black & Stephens, 1989). Notably the book, *Third Culture Kids: the experience of Growing up Among Worlds*, (Pollock & Van Reken, 1999), discusses the issue of negotiating the transition to a foreign environment and the adjustment to cross cultural variables for children and adolescents. However, the author fails to address the issues related to entire family during this period of transition.

The process of adjustment to a foreign environment for one or even two adults is tremendous. The process may even be more complex for a family with increasing numbers of members within the household and each with their own psychological, physiological, and social needs. Each family member (worker, spouse, baby, child, and teenager) will have a unique response dependent upon their stage of psychological and social development. Children in the family may react differently depending on their developmental age. Younger children (age 0-9) often present with mixed emotions; some anxiety and enthusiasm regarding the move whereas teenagers and those about to enter their teenage years (age 10-12) may react more negatively and more intensely as they feel out of control and angry (Polluck & Van Reken; Weeks, Weeks, & Willis-Muller, 2010). These children are quite aware that the move will disrupt their friendships and social activities and there is a lot of uncertainty regarding how they can handle such a big change. Teenagers are also in the midst of identity formation (Erickson, 1968) and forming

attachments to outside friends and their social community becomes more important than their former attachments to their parents.

Thus, it is very important for companies to recognize that such intense reactions occur for family members so that they are able to provide the appropriate supports for families dealing with such circumstances. Thoughtfully handling a move at this point in a child's, teenager's, or family's life is an important endeavor for the entire family system. While Weeks, Weeks and Willis-Muller (2010) examined the adjustment of teenagers living abroad, they failed to provide a systemic view of the entire family.

Shaffer and Harrison (2001) created a comprehensive model of expatriate spouse adjustment based on in-depth interviews from expatriates and their spouses. Shaffer and Harrison argued that there were three main antecedents to spouse adjustment. These three antecedents were: 1) an individual factor (i.e. language fluency, social self-efficacy, general self-efficacy, and change in employment status); 2) an interpersonal relationships factor (i.e. family issues and social networks); and 3) an environmental factor (i.e. favorable living conditions, assignment duration certainty and cultural novelty). Given that the study only focused on information regarding expatriate workers and their spouses, it remains unknown which factors are most salient for successful family transition during an expatriate assignment..

Literature in the field of work-stress has recognized and emphasized that stress and factors outside of work impact adjustment and performance at work (Jex & Beehr, 1991; Alliger, 1994). Williams and Alliger (1994) revealed that distress at work spilled over to affect family functioning and distress at home spilled over to affect one's functioning at work. Caligiuri, et al. (1998) suggests a spillover theory, which asserts that expatriates must make adjustments over multiple domains and that each of these domains may affect and influence the other. Thus, a

worker's experience at work can carry over into the home domain and the experiences at home can also affect the functioning in the work domain.

Takeuchi, Yun, and Tesluk, (2002) examined spillover theory for expatriate workers and their spouses in transition (e.g. adjustments over multiple domains). Comparisons were made between individual surveys from married expatriates and assessments of each of the expatriate workers adjustment at work. The authors found that if expatriate spousal adjustment was experienced as positive and successful, then expatriate worker performance reflected a "spillover" effect and was also reported as positive, successful and high performing. Unfortunately, with the exception of Caligiuri et al.'s (1998) foundational theory work examining expatriate familial adjustment, similar studies have not been done examining transition for expatriate families.

In the literature by Caligiuri et al. (1998), perspectives from work-family conflict literature were integrated to formulate a theory of family adjustment. Caligiuri et al. found spouse-family cross-cultural adjustment to positively influence expatriates' overall cross-cultural adjustment. Gaining the perspective of the spouse-family during cross cultural adjustment and the influence on the expatriate worker is the beginning of a fuller picture of expatriates' familial experiences in a foreign country. This data will enable companies to identify proper support measures such as counseling, so these families can successfully fulfill their tenures abroad and have a positive experience throughout their transition.

Expatriate Work Assignment Failure

These unique findings support the importance of examining the transitions and experiences of such a huge and expanding population. It is reasonable to expect the stress associated with the ambiguous roles and unfamiliar contexts experienced within a cross-cultural adjustment at home,

or in interpersonal communication, for an expatriate family to spillover and have an effect on experiences at work and vice versa, which could lead to a premature conclusion of the assignment.

Thus, it is important to explore the factors that affect an expatriate's ability to complete a foreign work assignment. This is true not only because of the great emotional and monetary costs to the family but also the monetary costs and investments to the companies that sponsor their workers. As previously noted, it estimated that international managers cost MNC's up to three times the salary of a U.S. executive (Maertz et al., 2009; Wederspahn, 1992). A premature departure of an expatriate worker from an international assignment will cost the MNC even more when considering the money and time invested in such a relocation (Arthur & Bennett, 1995, Shannonhouse, 1996). Therefore, it is necessary for companies to understand the many factors that impact an expatriate worker's transition process and ultimate adjustment to a foreign environment. Such understanding can help these companies ensure that their expatriates receive adequate support to complete their overseas assignments while caring for their family's needs (Andreason, 2003).

Work-related issues are certainly an important part of the expatriate experience and retention and are well documented in the human resource personnel literature (Enderwick & Hodgson, 1993; Halcrow, 1999; Tung, 1984). In addition, Black (1988) stressed that non-work issues are at least as important. Black and Stephens (1989) research cites the spouse's inability to adjust to the foreign environment as the number one reason for an expatriate's premature departure. Research by Tung (1987) cites problems in spousal adjustment, worker's adjustment and other family issues as the top three reasons for expatriate assignment failure.

Studies found in the human resources literature contained estimates that up to 85% of expatriate assignment failure are attributed to “family” (not only spousal) discontent (Diekhoff, Holder, Colee, Wigginton, & Reese, 1991; Zhu, et al. 2006)). Considering the fact that an early return has been estimated as costing a company/institution at least an additional 2.5 times the employee’s annual salary (Ory et al., 1991), there is significant economic incentive to identify factors that can help companies set up the necessary supports and resources for expatriate families before possible negative effects occur. There is also great social incentive: keeping families happy, healthy and together. This, in turn, is an incentive for employers and families to pay attention to the results that will be available based on this research study.

Expatriate Work Assignment Success

Prior research has indicated an increase in expatriate workers’ productivity when services and resources are identified and created to meet the needs of workers and their families (Black & Stephens, 1989; Caligiuri et al., 1998; Holopainen & Björkman, 2005; Shaffer & Harrison 1998, Takeuchi et al, 2002). This included resource elements such as language classes, psychological intervention for the children and spouses who are experiencing the effects of culture shock, and identification of healthcare providers that speak the native language of the expatriate family. In addition, research psychologists and therapists with a better understanding of the issues faced by this population may be able to create better treatment options.

Some expatriate workers may believe it is best to leave family members in the home country or not include them in the decision making process because companies emphasize the expatriate experience as one for the individual worker without children and partners for international assignments (Edwards & Rothbard, 2000; Reynolds & Bennett, 1991; Global trends, 2011). Unfortunately, by neglecting the impact of the family on this unique population,

companies and researchers may be overlooking one area that boasts the most influence over the success or failure of such assignments. In fact, according to Takeuchi et al., (2002), such companies would be making the wrong decision by *not* including families in the expatriation process. Takeuchi et al. found that the inclusion of spouses in the expatriate process had a positive influence on the expatriate worker's experience and adjustment to both work and the foreign cultural environment. However, additional research is needed to identify factors that contribute to a successful transition for families living abroad due to an international assignment.

Conclusion and Research Questions

The purpose of this current research was to explore the multiple experiences that expatriate families have in common during their transition to a foreign country. After thorough review of the existing literature, and seeing a void in the representation of the expatriate family experience, it was hoped that a better understanding of these experiences could be revealed. Through study of the personal experiences of the participants, it is hoped a universal understanding of the factors that are most salient in the expatriate family transition experience are identified. Identifying which experiences are important and common among expatriate families in transition can lead to better understanding of the supports and considerations families and the companies that sponsor them need to be considerate of before and during such a move.

It is expensive to send families abroad for work assignments. A premature departure of an expatriate worker and their family can be even more expensive while also affecting the reputation of the sponsoring company (Stori, 2001). Exploring the factors that characterize an expatriate family's overall experience on a foreign assignment can be extremely helpful information for companies to consider. It can aid companies in their understanding of the challenges and comforts faced by the families they send abroad. This understanding can ensure

that their expatriates receive adequate support to complete their overseas assignments (Andreason, 2003).

While work-related issues are certainly important and impact the expatriate family transition to living abroad, Black (1988) stressed that non-work issues are at least as important. The spouses and children of expatriate workers will often experience increased levels of stress due to the cultural transition. This has been found to have a cross-over effect in the expatriate worker causing a worker to experience increased levels of stress due to their consideration of the well-being of their family, as well as their experience of cross-cultural adjustment (Aryee, Luk, Leung, & Lo, 1999; Hechanova et al., 2003). Shaffer, Harrison, Gilley, and Luka (2001) found that challenges experienced by expatriate workers to balance work and family are strongly related to and often precipitate their withdrawal from their overseas assignments. Although the literature on expatriation has implicated the importance of work- and home-related factors as determinants of expatriate adjustment, there has yet to be a concentrated focus in the research that examines the importance of these factors for this population (Van der Zee, Ali, & Salome, 2005).

As the entire family goes through a process of transition and adaptation, children in particular, are often left out of consideration of the factors that impact positive and negative aspects of a relocation process (Caligiuri, et al., 1989). This is generally because children are most often not included in a family's decision to go abroad due to their age and status within the family (Caligiuri; Weeks et al, 2010). In reality, every member of a family has an impact on the transition and experience of a family moving abroad. Each individual family member's experience needs to be considered and included when considering the factors that characterize an expatriate's transition to a foreign country. Such consideration to all the members of a family

will illicit a more accurate account of the expatriate family experience and help support professionals such as psychologists, counselors, medical doctors, and family therapists meet the needs of these families.

Chapter III

Method

A Qualitative approach. The goal of this study was to explore transitions of expatriate families during their first eighteen months of transition to a foreign country. In order to adequately delve deeply into the richness of this human experience and to better understand the lived experiences of this population a qualitative research design was employed. Qualitative research results in specific knowledge and personal stories that add depth and yields a rich description of human experiences that cannot be extracted from objective measures (Moustakas, 1994). According to Moustakas (1994) the goal of qualitative research is not to produce generalizations, but rather in-depth understanding and knowledge of particular phenomena.

Phenomenological research. Qualitative family therapy researchers favor a post-positivist approach as their guiding theory (Gehart, Ratliff, and Lyle, 2001). A post-positivist approach has a broad rather than specialized perspective of research as interpretative. According to this premise, a post-positivist research paradigm considers a researcher's motivations and commitment to research, integrates theory and the facts of a study, allows for the inclusion of various things and concepts to be investigated, and assumes that the reality of the phenomena being studied is subjective and socially constructed and that the best way to understand this reality and the phenomena is through insight into "lived" experience of participants (Schratz & Walker, 1995). Phenomenology, the most frequently used post positivist theory attempts to accurately describe lived experiences around a given phenomenon (Moustakas, 1994). Phenomenological researchers strive for a rich or "thick" description of experiences rather than for explanation. When interviewing and analyzing data, researchers focus on "basic structures of

lived experience” (Polkinghorne, 1983, p. 203), including consciousness, perception, intentionality, and action of participants (Moustakas, 1994).

Phenomenology has been described as both a philosophy and a methodological science for examining human nature (Gehart et al., 2001). It involves examining meanings of events and interactions of people within a particular context. Phenomenologists do not assume to know meanings of perceptions of people they are studying. Rather, they look to a person to actually convey the meaning of his or her perceptions. Phenomenology relies on interpretive understanding of human interaction (Bogdan & Biklen, 1992). The focus is on subjective aspects of people’s behavior, since this subjective experience is believed to embody an abundance of knowledge and understanding of one’s given experiences. Therefore, in order to know how people experience a given phenomenon, in this case the expatriate transition, one must learn from the persons themselves what they experienced and how they interpreted these experiences within their worldviews.

Methodologically, a phenomenological researcher attempts to come as close as possible to people’s lived experiences, without the necessity of the researcher’s having experienced it him or herself. Phenomenological research attempts to describe the meaning of lived experiences for several individuals by describing what all participants have in common as they experience a phenomenon. Thus, the result is a universal description for the individual experiences with a phenomenon (Van Manen, 1990).

Epistemology of phenomenology is concerned with an idea of discovery based on a post-positivist approach of *Verstehen* as opposed to discovery based on the positivist approach of *Erklären* (Weber, 1949). *Verstehen* (interpretative understanding) and *erklären* (law-governed explanation) are two ways to make sense of a phenomenon in a scientific and respectable way.

A researcher who engages in *erklären* tries to make explanatory sense of the phenomenon by finding the laws that govern it, whereas the researcher who engages in *verstehen* tries to make empathetic understanding of the phenomenon by looking for the perspective from which the phenomenon appears to be meaningful and appropriate for the participants.

A particular challenge of research that seeks *verstehen*, is maintaining perspective (Byrne 2001; Gehart et al., 2001). Qualitative researchers are typically expected to specify their own philosophical and epistemological premises, because these assumptions guide all aspects of the research project, including choice of methodology, data collection procedures, and even analysis (Gale, 1993; LeCompte & Preissle, 1993). As a way to maintain and ensure perspective in phenomenological research, Byrne (2001), refers to the “bracketing” approach employed by German philosopher and mathematician, Husserl.

Husserl believed that by combining forces of math (science) and philosophy, one could develop a logical, balanced method of understanding experiences of human consciousness. Husserl believed that people have the ability to separate their personal knowledge from their observations and the experiences of others. In the practice of psychotherapy, one refers to this as maintaining perspective and being non-judgmental. Husserl referred to this as “*epoche*,” also known as “bracketing”. According to Husserl, the bracket, in which one sets aside preconceived notions, enables the researcher to objectively describe the phenomenon under study.

Gehart, Ratliff & Lyle (2001), supported this view by maintaining that key elements of such research include a focus on research questions and actual narratives received from participants (without interpretation). It is essential that researchers increase awareness of their own biases and assumptions regarding the experiences of participants, so as to maintain a perspective that minimizes its impact on the research. Since researchers cannot truly set aside all

of their biases, becoming aware of these and even acknowledging these can be a valuable source of meaning in research. This researcher's biases and assumptions regarding this study, as best as I was able to discern them have been listed and my related experiences (See Appendix A).

As one of the many types of qualitative research, phenomenology is aimed at gaining a deeper understanding of the nature and meaning of one's everyday experiences. Moustakas (1994) asserted that phenomenological researchers hope to gain understanding of the most basic truths of lived experience. By utilizing phenomenological interview techniques, it was my hope to uncover richness of experiences of expatriate families while discovering basic constructs that guide this population's transitions into new cultures. An added benefit of using a phenomenological approach has been, that as a qualitative approach, it assumes a different approach to inquiry than quantitative research, which has been a dominant paradigm in studies of expatriate transitions. As a qualitative approach, greater insight was developed into the nuances of familiar experiences, in this case, expatriate family transition, including how families began to deal with loss of their familiar contexts and how they adjusted to a new, foreign country.

Philosophical assumptions. Phenomenology is based on the writings of Edmund Husserl (1859-1938), and includes four philosophical tenets, as outlined by Stewart and Mickunas (1990). In order to present a deeper understanding of the philosophical underpinnings of this approach, the following is a brief outline of these four tenets.

The first of these four tenets is characteristic of *a return to the traditional tasks of philosophy*. Early phenomenological researchers were concerned with recapturing the Greek's understanding of philosophy in the pursuit of wisdom. These researchers thought modern philosophy had limited itself to examining the world solely in scientific terms and, thus, emphasized a stringently empirical, positivist approach to inquiry. Therefore,

phenomenology became an endeavor more concerned with the discovery of, and direct engagement with, a particular phenomenon rather than trying to understand experience exclusively through an empirical lens.

The second philosophical tenet is inclusive of the pursuit of *a philosophy without presuppositions*. Creswell (2007) highlights this tenet as particularly important to phenomenological research, because it is necessary for the researcher to “suspend all judgments about what is real – the ‘natural attitude’ – until they are founded on a more certain basis” (p. 58-59). Notably, philosophers and researchers such as Husserl and Moustakas, who have worked to develop the ideas and premises related to phenomenological inquiry believed the researcher should work as much as possible to approach a phenomenon “as if for the first time,” regardless of their familiarity or lack thereof with the phenomenon (Moustakas, 1994, p. 34). Thus, this approach to inquiry holds that it is not only possible, but also imperative, for a researcher to diminish effects of preconceived notions and beliefs that may preclude his or her ability to discover meanings that humans attribute to a phenomenon. There are techniques that are encouraged amongst practitioners of this approach, which are aimed at eliminating biases from their preconceived judgments. This will be discussed in the following sections.

The third tenet of phenomenology focuses on *the intentionality of consciousness*. Husserl (1931) believed in research based in pluralism in which one could not view subjects and objects separately due to their intertwined nature. Furthermore, Husserl maintained that humans, as subjects, always direct consciousness toward some object. This consciousness contains our lived experience. It is this lived experience, which influences our understanding of an object or event. Therefore, a researcher cannot understand a phenomenon or object independent from its relationship with his or her specific experiences. This distinction separates phenomenology from

empirical approaches to inquiry. Empirical approaches are intended to seek objectivity in understanding an object or outcome. The intent of phenomenal research is to represent the subjective experience of participants while seeking to minimize or avoid that of the researcher.

The final and fourth tenet of the philosophy of phenomenology, *the refusal of the subject-object dichotomy*, is taken from insights from symbolic interactionism, originally developed by Herbert Mead and later published by Blumer (1969). Essentially, phenomenology asserts that objects cannot have meaning beyond that attributed to them by the subject. Objective, inherent meaning does not exist within an object or experience. Rather, “the reality of an object is only perceived within the meaning of the experience of an individual” (Creswell, 2007, p. 59). This final tenet explains the phenomenological stance that meaning is rooted directly in the perspective of those experiencing a phenomenon. Accordingly, the researcher must suspend his or her previous assumptions of the Phenomenon, the observable experience or lived event. The objective of phenomenological research is that the reality of the specific participant’s experience should be discovered without bias from the researcher’s preconceived notions about the phenomenon.

Research Design

This study was exploratory research. The goal of this study was to explore the transition of expatriate families during their transition to a foreign country. This was accomplished by listening to the narratives of the participants. The focus was on the responses of participants to a moderately structured interview format consisting of 1) a brief, self-report demographic questionnaire and 2) a moderately long (90 minute) oral interview guided by questions focused around the couple and family’s (including those of the children) experiences of transition to a foreign country.

The couples were interviewed individually. This was based on the availability of the interviewer and interviewees. No children were interviewed. The questions explored the experiences of the family, from the perspective of the couple, and attempted to probe into their feelings, thoughts, concerns, resources and strengths regarding their experiences as well as the challenges they faced. It was hoped that the narratives would reveal rich details regarding expatriate experiences while also uncovering identifiable factors that are common among expatriate families.

The researcher conducted, audiotaped, transcribed, and checked the research interviews for accuracy by the persons interviewed.

Participants. This study examined the transition of expatriate couples with their families in a foreign country. Participants were comprised of married expatriate couples representing families (parents and children) who have lived abroad in a foreign country for no less than twelve months. There were five couples selected, which resulted in a total of 10 participants. The participants were selected from a heterogeneous expatriate population, in terms of nationality, ethnicity, and gender. Similar sample populations have been documented and utilized in previous expatriate research and literature (Ramalu, Rose, Uli, & Kumar, 2010; Van der Zee & Salome, 2005; Weeks et.al, 2010).

Purposive sampling was utilized to identify and recruit study participants. Purposive sampling refers to a researcher's selection of participants based on a set of characteristics or a specific purpose (Tashakkori & Teddlie, 1998). Purposive sampling is common for phenomenological studies that seek to explore a phenomenon on which there is a lack of prior information.

Participants were located through one primary source. Participants were identified through contact with a small multinational company (MNC) based in the northeastern area of the United States. This MNC employed a large percentage of expatriate workers. The company's human resource director was given a "solicitation letter" (see Appendix E), which contained a brief explanation of the nature of the study and requests for assistance with recruitment of participants. This letter was posted in appropriate company areas and distributed to employees. Interested participants were asked to contact me directly and my contact information was listed clearly on the letter. From this method of sampling, participants were identified that met the above criteria.

Qualitative studies do not seek to increase sample size as a means of improving validity. Typically researchers strive for "saturation" or "completeness" of their data. This "saturation" required just enough cases to clearly identify and substantiate results. According to Hill, Thompson, and Williams (1997), conducting such a study is intensive and time consuming and a sample of eight to ten participants is feasible. In addition, authors recommend a relatively small sample size in order to gain an in-depth understanding of each case and to maintain a high quality of participant care and concern. Five couples, 10 total participants, at which time theoretical saturation was achieved.

Couples who indicated an initial willingness to participate by leaving contact information in the form of a contact telephone number and/or email with the human resources director, were contacted. These phone calls were done utilizing an international teleconference number that was toll free for all participants. I followed the phone call by sending written confirmation through email and made a secondary telephone call to ensure receipt of the letter. The letter explained the purpose of the study, that participation was voluntary, that the participants had the

right to refuse to take part in the study and to withdraw from participation at any point in the process, without penalty. The letter also informed potential participants that all interviewing of the couples would be conducted individually and dependent on their availability.

Semi-structured phenomenological interviews took approximately 60-90 minutes. Each participant was prepared to devote 90 minutes from beginning to end, in order to appropriately account for paper work and instructions. Those who agreed to participate were sent an informed consent form, which fully informed them of the nature of the research and demands of the study. Each participant signed and returned the informed consent form prior to beginning the interview. Each participant kept a copy of his or her Informed Consent form.

As a part of Informed Consent, a signed release was also signed for permission to audiotape the interviews. The initial introduction, with names and identifying information was not audiotaped. This ensured confidentiality, because the person's name was not repeated on the audiotape.

All participants set up their interview time directly with the interviewer over the telephone, based on what was most convenient and comfortable for them.

Credibility. Credibility is an important concept in qualitative research. It concerns the congruence between participants' views of their experience and the way in which the researcher chooses to represent these experiences. According to Lincoln and Guba (1985), credibility refers to the trustfulness of criterion in qualitative research as compared to the internal validity in qualitative research. "Trustworthiness," a term used by Lincoln and Guba, is a concept in phenomenological methodology, which refers to the goodness or quality of research. The following are steps, which illustrate the intent and commitment to the principles of phenomenological inquiry and maintained the trustworthiness and overall credibility of this

study:

- 1.) Development of an appropriate phenomenological research question
- 2.) Close adherence to Moustakas' (1994) guidelines for transcendental phenomenology

Guidelines were followed to preserve trustworthiness in this study. Great care was taken to ensure that this research maintained a pure intent and commitment to the principles of phenomenological inquiry.

- 3.) Epoche/Bracketing: I made my preconceptions overt both to myself and to the reader to reduce the influence of any assumptions held (on my part) on the study. This increased confidence in the findings of this study.
- 4.) The identification of appropriate research participants that have experience with the phenomenon of this study. The research participants were all expatriate couples who identified themselves as parents and whose family had been relocated to a foreign country. These were accurate representatives of the targeted participants for this study.
- 5.) Close adherence to Moustakas (1994) phenomenological data analysis procedures as discussed in the research protocol.

Unlike quantitative research, in which statistical measures are employed, qualitative research involves the researcher as the instrument of measure. Moustakas (1994) describes the researcher as an instrument who collects and interprets data about the phenomenon from a particular phenomenological lens. The lived experience is a self-understanding of a phenomenon through the subjective knowing of the researcher as the instrument of measure (Patton, 1990). Therefore the qualitative report must include information regarding the researcher, so that my assumptions and biases can be differentiated. This is known as the epoche or bracketing (Moustakas). Appendix A contains the researcher epoche, autobiographical information related

to the study, and information regarding my expectations and prejudices, to the extent that I was able to know them, prior to entering into the research.

To further facilitate credibility of this study, I made every effort to ensure that the participants were comfortable and felt a level of trust so that they could be honest in sharing their personal experiences. In qualitative research this is often referred to as “prolonged engagement” (Lincoln and Guba, 1985). To family therapists, this process is known as “joining” and is a necessity for the building of trust between the practitioner and client (Minuchin, 1974). Joining with participants enabled them to feel more comfortable with me as the researcher and helped them to feel comfortable in engaging in a deep level of self-disclosure that provided a unique richness to the data.

To accomplish this, prior to beginning the interview, I ensured that the participants are comfortable with the environment and at ease regarding the procedures of the interview. Although the joining began with the phone calls, I found joining with participants over the telephone had an additional challenge. This occurred because the participants did not have the benefit of being able to have visual contact with me and the process was still being explained. It was very important to ensure that I telephoned from a place free of distractions (noise, sights) and that I spoke slowly and clearly and often repeat phrases to demonstrate to the participant that I was listening attentively.

A further step of “member checking” was established to extend confidence and comfortableness of each participant towards their involvement in the study. Member checking is a process by which participants were allowed the opportunity to provide clarification on study data. In this process participants were given their transcripts to check and review for accuracy. No participants were asked to analyze data. The participants were given a copy of their typed

transcripts to review and to check for accuracy. Through this process, a higher level of fit between the perceptions of the experiences by the participants and my representation of these experiences in the study were gained.

Dependability. Dependability, a second component of trustworthiness, was also sought for this study. Dependability refers to the extent to which a researcher documents their process of research and maintains transparency. The use of a researcher journal/log to record observations, thoughts and emotions experienced immediately following an interview allowed me the opportunity to record insights and challenges during the research process. As well, I bracketed or separated my own subjective experiences from that of the participants.

Triangulation was utilized in the form of recording observations, certain data, and literature facts and stored in the researcher's journal. The researcher's log, referred to as "observer's comments" was used as a resource to triangulate data. Triangulation is used to ensure the integrity and accuracy of findings (Patton, 1990). According to Rossman and Rallis (2003), triangulation is a method for looking at data in different ways or from different points of view. This was accomplished for my study by comparing data between the literature, interviews and my field journaling. Findings were compared and emerging themes were validated, corrected, and additional information about the phenomenon was elicited. This process was very useful in determining data saturation. The result was a visual description of repeating themes and responses.

Procedure. A written demographic questionnaire was given to each participant. This questionnaire consisted of many domains including but not limited to information regarding the education, occupation, income, ethnicity, race, nationality, religion, and family constellation of the participants (see Appendix B). This was followed by administration of the semi-structured

interview. Participants answered open-ended questions, for approximately 90 minutes, as part of the semi-structured interview (see Appendix C).

The comfort and well being of each participant was a priority. Thus much consideration was given to how and when the interviews were conducted. The average length of each interview was approximately 80 minutes. Each interview followed the format of two, 40-minute sessions, with a short break in between for the comfort of the participant. Continuation or breaking was based on the convenience and discretion of the interviewee. The questions were open-ended which encouraged the participants to answer freely, without leading them in any one direction. It also allowed the interviewer to probe into their responses and to acquire full, complete, descriptive information regarding the experience and topic. The interviews were conducted in English and all interviews were audio taped, with permission of the participants. The interviews were conducted in privacy either at the home of the participant or at the participant's place of employment. Both options of being interviewed afforded privacy, comfort and required no unneeded travel on the part of participants. A total of eight interviews were done in the homes of participants whereas two were conducted in secured, private office space at the participant's place of employment.

Data collection. The principal researcher was responsible for all data collection obtaining informed consent before conducting interviews. The issue of confidentiality was addressed in the initial phone call (see Appendix H) and also at the beginning of each interview. Maintenance of all records/interviews was discussed orally prior to the interview. Audiotaping began after introductions and names and any other identifying information had been said. All material was coded to insure confidentiality and protection of the identities of all participants.

Audiotapes, transcripts and flash drives were kept in a locked file to which only the researcher has the key.

Each participant completed a two-part data collection process which included: (1) a brief demographic profile (see Appendix B), (2) a semi-structured, phenomenological interview guided by open-ended questions (see Appendix C).

As a part of data collection, a researcher's journal was kept regarding her impressions, questions, and reactions, written immediately after each interview to account for observations made throughout this process. This notebook, referred to as the "observer's comments" and was kept confidential, as well, and used only as a way to remind the researcher of important nuances and data which occurred throughout this interview process. Recordings in this notebook were made immediately prior to and following each interview and at points throughout this research process in which insights impacting the research process needed to be noted. This notebook was also kept in the locked file cabinet.

Transcription. All audiotapes were transcribed prior to data analysis. The principal researcher transcribed all audiotapes and a copy of the transcription of the tapes was sent to each participant. Participants were asked to review their transcriptions for any additions, corrections, or clarifications. This process, referred to as "member-checking", ensured accuracy and reliability of their data.

Narratives. Direct quotes were used from the transcriptions of their narratives throughout the results section. This was done to further enhance the credibility of the findings and conclusions. Use of these direct quotes allows the richness of the participants' experience to emerge without interpretation from a secondary source. No real names or other identifying information has been revealed or associated with these narratives or quotes.

Demographic profiles. Demographic profiles (Appendix B) were collected for each participant identifying personal characteristics such as information regarding the education, occupation, income, and languages spoken at home, ethnicity, race, nationality, religion, and family constellation of the participants. The profiles assisted in creating a context for each participant's unique experience.

Semi-structured phenomenological interviews. Participants engaged in an individual phenomenological interview lasting approximately 60- 90 minutes. Open-ended questions were asked (See Appendix C) directed at exploring the experience of transitioning to a foreign country as a family.

Phenomenological data analysis. Phenomenology is both a philosophy and methodological approach to conducting research. Moustakas (1994) describes a modified data analysis procedure adapted from Van Kaam's (1966) method of phenomenological data analysis. This encompasses seven steps, which allow the researcher to investigate the essence of participant experience from the myriad of data he or she collects. These seven steps, taken from Moustakas include (1994, pp. 120-121):

Step one: Listing and preliminary grouping. Data was transcribed verbatim, from each audiotape. There were no omissions of statements or words from the transcript, and each phrase was considered equally relevant. The viewing of each statement as having equal value is known as horizontalization.

Step two: Reduction and elimination. This was accomplished by repeatedly reading each transcript and eliminating statements that did not answer the guiding question. Overlapping, repetitive, and vague expressions were eliminated. The remaining statements became the invariant constituents (the meaning units or horizons) of the experience. These statements served

to describe the phenomenon in exact descriptive terms.

Step three: Clustering and thematizing the invariant constituents. The invariant constituents were clustered and defined according to “core themes of the experience” (Moustakas, 1994, p. 121). Thus, responses from participants were grouped according to “core themes of experience” (e.g. establishing the expatriate community). These groupings were examined across all participants to identify and evaluate trends and patterns.

Step four: Final identification of the invariant constituents and themes by application: Validation. The invariant constituents and the resulting themes were checked against each individual transcript to make sure the theme was either expressed explicitly or was compatible with the constituents. This process helped determine the relevancy of the experience.

Step five: Construction of individual textural description. Excerpts from each participant’s transcript were explained in brief narrative form. This process aided in understanding “what” the expatriate families have experienced.

Step six: Construction of individual structural description. Incorporated into the textural description a structure explaining how the experience occurred. This process aided in understanding “how” the experience occurred. (Moustakas, 1994, p. 79).

Step seven: Composite description textural-structural. A textural-structural description of the meanings and essences of the experience for the participants. This incorporated the invariant constituents and themes.

Chapter IV: Data Analysis and Findings

Introduction

This chapter provides the data analysis and findings of this study. The purpose of this qualitative phenomenological study was to develop a rich description of the nature of expatriate experiences and at the same time uncover factors that make expatriate transitions more or less successful for the worker, the spouse, the children and the family as a whole. This study was completed by conducting ten face-to-face interviews with married expatriate couples, representing families (parents and children) who have lived abroad in a foreign country for at least twelve months. The main method was a modified van Kaam method by Moustakas (1994), which centered on the lived experiences of the participants who all have had firsthand knowledge and experiences of living away from their home countries.

Description of the Sample

The participants of the study were five married expatriate couples who represent families of parents and children. Each of the five couples was interviewed individually resulting in ten (n=10) participants. The breakdown of the demographic information about the participants can be seen in Table 1. All couples were required to have lived abroad in a foreign country for at least twelve months. Overall, there were five males and five females interviewed. The age of the participants ranged between 41 to 48 years old. Four subjects, (40%) were 42 years old. Their countries of origin were: the United States (6; 60%) and Japan (4; 40%). The participants' self-reports identified six racial categories with the following distribution: 2 (20%) Mongolian, 1 (10%) American, 2 (20%) Asian, 1 (10%) Canadian-American, 2 (20%) Caucasian, and 2 (20%) White. In terms of ethnicity, participants self identified as 2 (20%) Asian, 2 (20%) Caucasian, 1

(10%) Italian-American, 1 (10%), Italian-Slovak, and 2 (20%) Japanese. Eight of the ten participants reported religious affiliation. Six out of the ten (60%) were Catholic and two (20%) reported being Buddhist. The occupational status of the sample was: three (30%) house maker/stay at home parents, two (20%) in finance, 2 (20%) were business owner, and one in-house counsel, IT executive, and marketing manager. Their host countries were: Switzerland (6; 60%) and the United States (4; 40%). The length of time stayed in the foreign countries ranged between 2 to 8 years; where 4 (40%) participant lived in the foreign country for 3 years, 2 (20%) lived for 2 years, 2 (20%) for six years, and another 2 (20%) lived for 8 years. Only 4 (40%) of the participants reported speaking the national language of the host country fluently. Three family units (6 participants, 60% of the sample) reported that this experience was their family's first expatriate assignment, and 4 (40%) reported that this experience was their family's second familial expatriate assignment. During the interview period, four (40%) out of the 10 participants were still on assignment. The numbers of children among the 10 participants were either 1 (2; 20%) or 2 (8; 80%) only. The children's' age at the beginning of this expatriate assignment ranged between 1 to 11 years old. There were no children born on assignment.

Table 1		
<i>Participant Information</i>		
Category	Frequency	Percent
Gender		
Female	5	50
Male	5	50
Age		
41	2	20
42	4	40
45	1	10
46	2	20
48	1	10
Country of Origin		
Japan	4	40
United States	6	60
Race		
Mongolian	2	20
American	1	10
Asian	2	20
Canadian-American	1	10
Caucasian	2	20
White	2	20
Ethnicity		
Asian	2	20
Caucasian	2	20
Italian-American	1	10
Italian-Slovak	1	10
Japanese	2	20
Religion		
Buddhism	2	20
Catholic	6	60
Host Country		
Switzerland	6	60
United States	4	40
Time in Host Country (years)		
Two	2	20
Three	4	40
Six	2	20
Eight	2	20
First Expatriate Assignment		
No	4	40
Yes	6	60
Number of Children		
One	2	20
Two	8	80
Currently on Assignment		
No	6	60
Yes	4	40

In the following section, a family description is given for the couples that participated in this study. In each description, general information is given about the family unit and then each participant's experience is explored, highlighting the individual phenomena (themes) that were expressed and revealed through data analysis of their interview transcripts. For each couple, individual data was then analyzed and compared to identify any shared themes and/or experiences.

In addition, the impressions and observations of the primary researcher's experience are included. This data was obtained from the interviewer's personal perspective before, during, and after the interviews and noted separately in the interviewer's journal as the observer's comments to bracket, or keep separate, these observations from the interviewing process. The researcher's experience is an integral part of phenomenological process as a researcher is also considered a participant by sheer nature of the impact of their role. Once bracketed, the researcher's experience can be examined and reflected upon to see what, if any impact it might have had on the process and the participants. The information can also be utilized to further insight into process of interviewing or analyzing the phenomena. This adds a richer texture and meaning to the interpretation and discussion of the results.

The O-Tachi Family Description

The O-Tachi family is a Japanese family of four, residing in the United States for their expatriate experience. The family consists of the father/husband, Kenichi; mother/wife, Atsuko and two sons, Koichi and Itaru. The husband works as an attorney for a multinational company and his family relocated to the United States due to his job. His wife reports herself as a homemaker and former teacher of English in Japan. The foreign assignment for this study represents their second expatriate family assignment, as they reported living in the United States

for approximated three years while Kenichi was sent over by his company to complete his law degree.

Atsuko's experience. Atsuko, the wife, requested to be interviewed at her family home before her two sons returned home from school. During the interview, she revealed that safety, issues of culture, getting her kids properly prepared for [American] school, connection to her expatriate community, keeping things normal for her kids and family, maintaining extended family and friend connections, family time, and issues of transition back to their country of origin were important parts of their move to the United States.

Kenichi's experience. Kenichi, Atsuko's husband, was interviewed at his place of employment. Kenichi shared about the importance of family safety, issues of culture, maintaining normalcy during the transition, maintaining a balance between work and family, connection to his expatriate community, performing well at work, family communication, establishing family time in his host country, maintenance of extended family and friend connections, and issues of transition back to their country of origin as important parts of their move to the United States.

Shared experience. Kenichi and Atsuko shared the following themes and experiences: family safety, issues of culture, maintaining normalcy during transition, importance of connection to the expatriate community, maintenance of extended family and friends connection, family time in host country, and issues of transition back to their country of origin.

Researcher's experience/observations. Atsuko stands out primarily because she was the first participant interviewed in this study. I first met Atsuko at the family home for the interview. My initial impression was one of warmth and openness as I was invited, without hesitation, to interview her at their home. She promptly met me at the door with a large smile

and outstretched hand, for shaking before I could even ring the doorbell. It was as if she was waiting excitedly for my arrival. I was able to greet her with a few words and phrases in Japanese (“Ohio,-Kasamous, Wa tah she wah”=Hello/Greeting, my name is...) which I had hoped would establish some rapport and make her feel like I too, as the interviewer/researcher was a part of the process and was willing and able to participate as well. I genuinely felt my spoken Japanese sounded like garble and I apologized, feeling somewhat embarrassed by my attempt and regretful that I had not practiced more. However, her smile widened and she seemed delighted at my attempt and said she was impressed by my Japanese and that she thought Japanese was much more difficult than English. Atsuko made Japanese tea and biscuits available and insisted that we both partake in sharing food prior to and during the interview. I had been feeling a bit nervous-about going to her house-I did not want to impose on the family’s privacy. Atsuko’s openness and friendliness set the tone for me, making me very excited for the rest of my interviews as it was recorded in my journal at the end of our interview. Here is the excerpt from the journal:

Wow-that went really well-so nice, so comfortable, so much information. Thank goodness for audiotaping. Now that I have one down and know how well it can go I am excited to do more and get this done.

Atsuko seemed very excited to have me in her home and expressed her hope that her ability to articulate in English was acceptable, which it was. She was able to give lengthy, in-depth answers with little probing or follow-up from me, possibly due to her seemingly strong conversational skills as an English instructor in Japan. A number of times she asked if I could understand her and follow her English, citing that she did not believe it was very good and that at times her accent might interfere with my ability to comprehend what she was saying. For my part

I was very impressed with Atsuko's English skills and having previous experience professionally and personally with many speakers of English as a second language, I found her skills to be quite advanced. Later, when it was time for her to review her transcripts she was very receptive and helpful in responding promptly. I felt somewhat regretful, that I could not further bridge our rapport with more phrases in Japanese, but because it was so comfortable and she seemed very at ease, that feeling quickly subsided.

The husband, Kenichi, was interviewed in a private conference room provided and secured at his place of employment. He presented as very excited to be interviewed and to share their experiences. He expressed that he was happy to contribute to the research. I was pleasantly surprised that he was very personal, not formal at all. He was friendly in a casual way, as if we had met before. I had expected him to present in a business like way, partly because we met at his office and partly because previous meeting in his office and partly because on previous encounters with Japanese businessmen there was always a formality, a business like protocol. He warmly greeted me and was very chatty.

During the pre-interview period, he openly expressed his excitement regarding the interview and his interest in psychological research. He made cappuccinos for us from the office machine and then the interview began. His responses were lengthy, but concise. It seemed as if he had been speaking English all his life and he said that he learned as a child in a program in Japan but became what he called "very American in my English" while in grad school, as he was a young adult and academically and socially did a lot with other graduate students.

The Yee Family Description

The Yee family is a Japanese family of three residing in the United States for their expatriate experience. The family consists of the father/husband, Kazuhisa; mother/wife, Yumi

and daughter Naoko. The husband works in finance for a mutli-national company and it is due to his job that the family has relocated to the United States. Yumi reported her work status as a homemaker. The foreign assignment for this study represents their second expatriate family assignment, as they reported living in the United States for approximately two years while Kazuhisa was sent over by his company to complete an advanced business degree (MBA).

Kazuhisa's experience. Kazuhisa was interviewed at his place of employment. Throughout his interview he expressed the importance of proper preparation before leaving for the expatriate assignment, family safety issues, supporting his wife in her new role, issues of culture, preparing his daughter for [American] school, spending time together as a family, family cohesion, connection to the expatriate community, family communication, keeping things as normal as possible, maintenance of extended family and friend connections and issues of transition back to their country of origin.

Yumi's experience. Yumi requested to be interviewed at their family home. Throughout her interview she expressed the importance of proper preparation before leaving for the expatriate assignment, family safety issues, supporting her husband in his new role, issues of culture, preparing her daughter for [American] school, spending time together as a family, connection to the expatriate community, issues of family cohesion, family communication, maintenance of extended family & friend connections and issues of transition back to their country of origin.

Shared experience. Kazuhisa and Yumi shared the following themes and experiences: proper pre-expatriate assignment preparation, family safety issues, supporting spouse in their new role, issues of culture, preparing their child for American school, spending time together as a family, connecting to the expatriate community, family cohesion, family communication,

maintenance of extended family and friends connections, and issues of transition back to their country of origin.

Researcher's experience/observations. I first interviewed the husband, Kazuhisa. The interview took place at a private room, secured at his place of employment. During the interview, the husband presented formal and deliberate with his answers. He was highly articulate with the English language and seemed to take some pride in his proficiency. He had a piece of paper and a pen and as the interviewer asked questions, he wrote in Japanese and then thought for a moment before answering. Prior to his interview, he asked if this would be okay and informed the interviewer that writing notes in Japanese was an effective way he has found through the years to help his fluency and to make sure he is understanding completely what is being asked in English. He noted that he wanted to provide the research and researcher with the most accurate and honest answers as possible.

He presented as formal but very willing to conduct the interview. Before we began the interview he stated he was very willing to contribute to this research with a sincere hope the research will help other expatriate families, especially those from Asia, as he expressed that he felt it was probably more of a cultural stretch to adapt to or from an Asian culture to an American/European culture as compared to the many Europeans expatriates adjusting to an American culture (or vice versa). He said he held the belief that European and American cultures are a lot more similar than Asian and European and/or American. He also stated that he felt it an honor to contribute to any scholarly research and thanked the researcher for this opportunity. Kazuhisa presented as very genuine and I was very appreciative of the honor that he felt to add to my research. This made me feel that my research was very important, and valued and really made me want to capture his and others experience as purely as possible. I felt

like I did not want to let him down by doing a less than “scholarly” job. There were quite a few moments of silence while he prepared to give quite lengthy, but precise and complete answers. I was amazed how comfortable I was and found that I did not need to talk very much but listen and nod my head to validate his feelings.

He also made note to say after the interview that his wife was a bit nervous because her English, although fluent, her comfortableness using it can vary... I took this as more of a reflection of his pride of his proficiency and perhaps him being humble on her behalf, given she does not work professionally in the USA so she does not use English in the same regard as he must. I found her English ability to be quite high and there were no issues speaking and interviewing with her. Although I found the interview with the husband more business-like, it was comfortable and easy to get him to generate answers.

The interview of the wife, Yumi, took place at the family home and she presented as very warm, setting out Japanese tea and pastries for us prior to the interview. She seemed a bit nervous and verbally confirmed that she was nervous. She also had a note pad and pen but only used it during the first question and then she seemed to relax and disregarded using it to aid her in the interview process.

I felt much more comfortable in the home this go around, having had completed one home interview previously. Yumi spoke in a soft voice and seemed very specific with her answers, like her husband. However, the feeling was a lot less formal. She seemed a bit nervous in the beginning but that seemed to dissipate after the first question. When the interview was concluded, Yumi spontaneously got up and retrieved photos of her family from their early days “of transition” to the United States. I was thrilled that she felt like sharing these personal

photographs with me. Seeing these photos of her family seemed to make the stories she shared with me more intimate and really connected me to her family's experience.

The LaSalle Family Description

The LaSalle family is an American family of four, from the East Coast area, who resided in Switzerland for their expatriate experience. The family consisted of father/husband Tim; mother/wife Lauren, and two sons Alan and Nathan. The move was a result of the husband's job in finance for a large multi-national company. Lauren described herself as a homemaker, although in previous years she taught at a Catholic preschool in the United States.

Tim's experience. Tim interviewed in his family's home. Tim's experiences reported during the interview focused on the importance of proper preparation before leaving for the expatriate assignment, feelings of adventure, feelings of worry about his wife's transition and adjustment, spending time together as a family, issues of family cohesion, issues of culture, connection to the expatriate community, concerns for children's adjustment to life abroad, family communication, maintenance of extended family and friend connections, and issues related to his transition back to the U.S., as important parts of their move to Switzerland.

Lauren's experience. Lauren interviewed in family home. Lauren's experiences within the interview focused on the feelings of adventure, fear, excitement, anticipation, depression and isolation, spending time together as a family, issues of family cohesion, issues of culture, connection to the expatriate community, concerns for children's adjustment to school and life abroad, family communication, maintenance of extended family and friend connections, and issues of transition back to the U.S.A. as important parts of their move to Switzerland.

Shared experience. Tim and Lauren shared the following themes and experiences: feelings of adventure, spending time together as a family, family cohesion, issues of culture,

connecting to the expatriate community, concerns for children's adjustment to life abroad, family communication, maintenance of extended family and friends connections, and issues of transition back to their country of origin.

Researcher's experience/observations. At first I was a bit anxious interviewing this family. I needed to take a few moments in my car before ringing their doorbell. I felt this was because I expended quite a bit of energy driving and reaching their home. Their home was a bit remote and the drive to their house required quite a few back roads. However, after being greeted by Lauren at the door and her smiling husband sitting in the kitchen, with hot tea steeping, there was a comfortable feeling, as if I had met them before. It also helped that I was on time, lessening any feelings of disrespect to the couple for arriving late to their home.

The family was very congenial and invited me into their home for the interview. Both husband and wife were interviewed on the same day (separately). Although not interviewed, I also met the children. Both Tim and Lauren were happy to assist in any research in which they could use the knowledge that they accumulated while abroad. Lauren was eager to talk and later mentioned that she would be open to talking more in the future, if that was a need. Tim was also very open and commented after the official interview that he had never had the opportunity to really reflect on his experiences and felt like this really gave him a way to finally transition back to the US, as to say "formally end" his experience abroad. He reported that upon returning he was just thrown back into work and life. The experience was very big for the Lasalle family because only the wife had experience in traveling to another country. It was the very first time for her husband and two sons.

We spent about 15 minutes talking, the three of us and then I started the first interview with the husband as the wife disappeared into another room. He was extremely excited and

talked easily about his experiences. We concluded our interview in 70 minutes and after a 10-minute break the next interview began with the wife, Lauren. The couple seemed to really like that fact that they were being interviewed separately and both remarked that they wondered what their partner's response was or speculating what they thought their partner would say. After completing both interviews their sons arrived after hockey practice. It was interesting to attach faces to the names of the kids that were mentioned with such emotion by each parent. For me, this helped to really personalize their stories and it furthered ingrained their individual stories into experiences that later could be recounted. I was glad to meet the children after the interviews were completed, as it did not shape or predispose me to thinking or feeling a certain way about the experiences that were told to me by the parents. I felt I could actually "see" this family living many of the experiences they had just spoken about. On my way home I found myself thinking about their stories and even got lost-I believe because I was replaying their experience over in my mind.

The Whitney Family Description

The Whitney family is an American family of four, who resided in Switzerland for their expatriate experience. Originally the family was from a farming community in the Northwestern part of the United States. The Whitney family consisted of father/husband, Michael; mother/wife, Karen; daughter Isabelle; and son Zack. Prior to moving the family had experience moving around the United States to different geographical regions which they reflected as being "helpful" in understanding a bit about diversity as the wife, Karen stated after the formal interview that "areas like Washington and Idaho can be quite homogenous...living on the east coast and Midwest, thank God, helped us become quite open to other cultures than our own farming Northwestern upbringing." Michael's job, as a marketing manager for a multi-national

company was the family's reason for relocation abroad. The mother Karen reported being a teacher for many years and then a stay at home mother and small business owner.

Michael's experience. Michael interviewed in his office at his family home.

Throughout Michael's interview he focused on feelings of adventure, feelings of worry about his wife's transition and adjustment, spending time together as a family, issues of family cohesion, issues of culture, connection to the expatriate community, concerns for children's adjustment to life abroad, and family communication.

Karen's experience. Karen interviewed in her family home. Karen's experiences within the interview focused on the feelings of adventure, fear, excitement, anticipation, depression and isolation, spending time together as a family, issues of family cohesion, issues of culture, connection to the expatriate community, concerns for children's adjustment to school and life abroad, family communication, maintenance of extended family and friend connections, and issues of transition back to the U.S.A. as important parts of their move to Switzerland.

Shared experiences. Michael and Karen shared the following themes and experiences: feelings of adventure, spending time together as a family, issues of family cohesion, issues of culture, connection to the expatriate community, concerns for children's adjustment to life abroad, and family communication.

Researcher's experience/observations. I was invited into their home to conduct the interviews with the Whitney family. It was in the late morning and both children were in school and both parents were home. Karen greeted me at the door wearing a huge smile and a noticeable cowboy hat. She said she was excited and was "connecting" to her western hospitality by wearing her favorite cowboy hat that she used to wear on her family's farm.

Karen was immediately, very talkative. She confided that her husband can be very taciturn and that when he brought home the information from work about couples needed for the study and she literally jumped at the opportunity to participate, whereas her husband was indifferent because as she put it “he just doesn’t talk much”. This information was unsolicited but immediately I tried to “bracket” it so that I would not have a pre-judgment about Michael’s responses. Karen was also very comfortable with touch and gently touched the researcher on the shoulder and pulled her arm to guide her into a sitting area in the kitchen where the interviews would take place. Karen presented as very friendly but also very strong willed-it seemed as if she directed everything in the household. At that point, I decided to interview Michael first (if possible) as I was a bit weary that Karen might say something or remark in a certain way that would give me a certain preconceived perception of Michael. I did not want to cloud or influence my interview with Michael and for some reason I had a strong inclination that speaking to Karen first might do so.

Karen called Michael from his home office to meet the researcher. He was tall, at least 6 foot 2 or 3 and very pleasant. He shook my hand and seemed to wait for instruction from Karen. The three of us chatted for 5 minutes and then I asked if I could begin with Michael. He responded positively, noting that he had a teleconference to attend to in a few hours and that after he would be picking the kids up from school. He said we could use his office and said follow me. Immediately Karen seemed dismayed and asked “Why your office? I’ve set up a place in the kitchen.” Michael responded laughing slightly and in a low, almost whisper of a voice “Privacy-honey-privacy. The sheet said separate interviews and something about being comfortable. This is my interview. I’m most comfortable in my office”. There was a sense of playful banter back and forth and a bit of exasperation from Karen, as it seemed obvious she had

“set-up” an area. The banter was slightly uncomfortable, as the couple seemed to play out a bit of their own power-struggle in front of me. I was open to conducting the interview wherever was most comfortable for each participant and again, bracketed these observations and feelings as to separate them from myself as the interviewer.

Michael was to the point and elaborated only when he felt it necessary. It didn't seem as if he was rushing or trying not to talk, more that when he had a lot to say about something he would but otherwise did not need to. For example, he seemed very passionate when talking about his experience with the differences in Swiss culture as compared to culture in the United States. He even came back to it later in our interview. Contrary to Karen's description, he was only taciturn when asked something that he was not passionate about.

Karen was interviewed in the kitchen area she had set up. She offered tea, coffee and diet coke. She also had pastries and cold pasta salad. She commented that she was excited because meeting at her home and talking about her time abroad in Switzerland reminded her of times she shared with her girlfriends at home drinking coffee or diet coke in which they commiserated over various happenings in their foreign home. Karen had a lot to say about everything and it was a joy to just sit back and record and listen to her experiences. It felt as if she was actually transported back to her times back living abroad. Perhaps it was the atmosphere, being in the comfort of her home, with the coffee and diet coke, just chatting like she did with her girlfriends. I could see the nostalgia in her face as she recalled her experiences in vivid detail. Her interview lasted about 2 hours but seemed to go by very quickly. After we finished, I could not help but notice the many family photographs on the walls. Karen noticed me looking and then went into detail about each one. I left, feeling like I really knew this family.

The Johnson Family Description

The Johnson family is a family of four living in the U.S. and resided in Switzerland during their expatriate assignment. The family consisted of the father/husband, Brian; the mother/wife, Nicole; Matthew, their son; and their daughter, Zoe. Relocation was due to the husband's job as an Information Technology specialist at a multi-national company. Nicole, a Canadian-American and a small business owner prior to moving abroad, became a stay-at home mom while living in Switzerland. Both the husband and wife had considerable travel experience abroad in the past: the wife as a flight attendant and the husband as part of the military and then while working for different multi-national corporations. The family adopted their youngest, daughter Zoe, shortly before beginning their expatriate assignment.

Brian's experience. Brian was interviewed at the family home. Throughout Brian's interview he focused on feelings of adventure, spending time together as a family, issues of family cohesion, issues of culture, connection to the expatriate community, keeping things as normal as possible, concerns for children's adjustment to life abroad, and family communication.

Nicole's experience. Nicole interviewed in family home. Nicole's experiences within the interview focused on the feelings of adventure, fear, excitement, anticipation, depression and isolation, spending time together as a family, issues of family cohesion, issues of culture, connection to the expatriate community, keeping things as normal as possible, concerns for children's adjustment to school and life abroad, family communication, maintenance of extended family and friend connections, and issues of transition back to the U.S.A. as important parts of their move to Switzerland.

Shared experience. Brian and Nicole shared the following experiences: feelings of adventure, spending time together as a family, issues of family cohesion, issues of culture,

connection to the expatriate community, concerns for children's adjustment to life abroad, and family communication, and keeping things as normal as possible.

Researcher's experience/observations. The Johnson family invited me into their home to complete the interviews. I received a warm greeting and quickly proceeded to begin the interview. I interviewed the husband, Brian, first, in his home office. Brian was quite quick in his answers-even the more lengthy ones, he was able to answer quite quickly. He seemed to have an idea of what to say for each question and even when the researcher allowed for extra silence, giving him the opportunity to expand his answers or when he was gently probed for more, Brian held steadfast to his curt answers. Brian presented as very efficient and helpful, wanting to answer the questions honestly, but as succinctly as possible, to the point, with little in terms of descriptives.

The wife, Nicole, was extremely interested in the research and was quite open in talking and making lengthy, descriptive answers. They both expressed a high comfort level with having experiences abroad but both noted that despite their experiences with other cultures, from work, travel friendships and family (they had just adopted a daughter from China prior to moving to Switzerland) being immersed in a foreign culture as a family came with entire set of other challenges and considerations that go beyond being "open" or "comfortable" around diverse cultures and environments while living in the United States. Although they both seemed to present this in a matter-of-fact way, and mostly void of descriptive language, the emotion was there and I could feel they were sincere and really felt this as a challenge during their experience abroad.

Analysis

The modified van Kaam method by Moustakas (1994) was used for analysis. This modified method is made up of seven critical steps to discover the lived experiences of the expatriate families during their transitions to living in a foreign country. Five main themes were developed, as well as other supporting fundamental lived experiences from the participants. These are also known as invariant constituents or sub-themes, which all played important roles in addressing the two research questions of the study. In the next part of this section, original verbatim texts are used within the analysis to aid the reader in understanding the organized themes and essential experiences from the perspectives of the ten participants.

Methodology: steps one and two. The first step of the modified van Kaam method was the "listing and preliminary grouping" of the responses of the ten participants from the interviews. This step is also commonly tagged as the "horizontalization" process wherein the researcher listed down all the significant experiences and perceptions connected to the topic at hand (Moustakas, 1994, p. 120).

This step was followed by the "reductions and eliminations" stage, which consisted of two queries to determine whether or not the answers of the married expatriate participants can be included to the next stages or eliminated early on. According to Moustakas (1994), the research questions should be followed as guides.

With the two research questions, the researcher carefully analyzed the ten interview transcripts of the participants. The second step was performed when the researcher decided which parts of the interviews were to be incorporated to the next steps and stages of the analysis. At the same time, those experiences deemed to be irrelevant of meanings and substances were then removed.

Step three: clustering and thematizing. The other fundamental experiences, or also known as the invariant constituents, developed in the second step of the method were collected and grouped together to form thematic labels. As part of Step Three, “clustering and thematizing”, the grouped and thematized constituents were then structured as the "core themes and experiences" of the participants (Moustakas, 1994, pp. 120-121). These groupings were examined across all participants to identify and evaluate trends and patterns.

Step four: final identification of the invariant constituents and themes (validation). The invariant constituents and the resulting themes were then checked against each individual transcript to make sure the theme was either expressed explicitly or was compatible with the constituents. This process helped determine the relevancy of the experience.

Step five: construction of individual textural description. Excerpts from each participant’s transcript were explained in brief narrative form. This process aided in understanding “what” the expatriate families have experienced.

Step six: construction of individual structural description. Incorporated into the textural description is a structure explaining how the experience occurred. This process aided in understanding “how” the experience occurred (Moustakas, 1994, p. 79).

Step seven: composite description textural-structural. A textural-structural description of the meanings and essences of the experience for the participants. This incorporated the invariant constituents and themes.

These final steps of the modified van Kaam method by Moustakas (1994) revealed five main themes and fourteen sub-themes, which can all be considered as crucial in addressing the research questions of the study. The five main themes were identified from the stories of the participants generated from the two original research questions centered on transition and coping

(respectively) to living in a foreign country. The first research question centered on the initial transition to living in a foreign country for the family and elicited two strong themes, which resonated with all participants. Theme one (1) was identified as “Keeping it together for the kids” Theme two (2) was “Shock and Awe: Difference in Culture”. Meanwhile, the second research question revealed coping mechanisms that the participants identified as helpful to the transition. This lead to three other pronounced themes of the study which were; theme three (3) “The Expatriate community was a little slice of heaven”, Theme four (4), “We never talked so much as a couple in our lives” and theme five (5) “We did everything together!”

Themes

Theme one: keeping it together for the kids. The first theme that emerged was experiences of expatriate families dealing with learning, adjusting, and following new daily practices and routines, especially language, which was summarized by Lauren who explained that she and her husband navigated this complex transition by “keeping it together for the kids”.

This first theme was deduced from four invariant constituents, which can be referred to in Table 2. This theme embodied experiences of participants, in which they experienced difficulty in transitioning initially to new things, such as housing, schools, transportation, daily shopping, routines, expression of emotions, and languages of foreign environments. This received the highest number of responses, with every participant in the study speaking to this theme. This was a unique, shared experience among the members of the study sample, standing out beyond all other invariant constituents.

Table 2	
<i>How Expatriate Families Experience Transition to a Foreign Country</i>	
<u>Invariant Constituents</u>	<u>Number of occurrences</u>
Keeping it together for the kids	10
Shock and Awe: The experience of feeling the difference in cultures wherein the expatriates were shocked with how different the values and norms were from their country of origin	9
Pre-conceived notion that the transition would be easy, but proven otherwise once they arrived in the foreign country	3
Getting the kids properly prepared and ready for school given that it was very difficult to register formally in the host country	2
Safety: Feeling safe or unsafe	2

Overall, participants shared a similar experience of having a difficult time in dealing with learning, adjusting, and following new daily practices and routines, effectively utilizing language/communication skills and expression of emotions. Thus, to better define how families experienced transitions to a foreign country by “keeping it together for the kids”, the following three sub themes were identified: (1) Language/Communication, (2) Hidden emotions of parents, and (3) Normalized emotions of kids. It was through these three processed that the expatriate families kept it together for the kids and began their initial transition to living in a foreign country.

Lauren stated:

So it is difficult, making the transition to a foreign country. It’s a complex experience full with differing ways of communication or language use, a wide range of emotions and things to do, to adjust to and just simply do. But by keeping it together for the kids you get it done. That’s what that part of the experience was like-what it was all about. Just

keeping it together for the kids during that difficult time, until we got situated and things were better. Making it good for the kids made it easier to get through that difficult transition.

From this excerpt, one can hear the significant impact the experienced themes of both communication/language and emotions were to initial experiences of transitions to a foreign country.

Michael stated that his experience of transition was made difficult because of language, daily transportation, and other norms that they were not used to and he shared how he and his wife dealt with this initial difficulty. He stated:

The language, the damn public transportation system, businesses not open on Sundays and evenings. Most difficult part of the entire experience. And the initial experience was the challenge on the family members...navigating grocery stores, trains-trams-buses, language, schools, etc. My wife and I probably would have gone nuts but we made it fun for the kids-we made the difficult, crazy annoying stuff that we had to get used to in the beginning seem like fun so the kids would not feel the difficult part and so they could have an easy transition. Like at the grocery register when I could not understand the clerk and the clerk gave me a nasty face or said something I knew was rude in German instead of getting angry or cursing I would smile and say to my wife and kids... "hmmm the nice cash register lady just said what lovely kids we have and Welcome to Switzerland!" That actually made it easier and, and bearable for us. If the kids would have experienced that time as difficult then it would have been a total disaster for us...more so for my wife-which would of then made it awful for me!

Tim shared his experience of the language:

I think it was the language. It was the most immediate, striking difference. You were just immersed in something that is totally, honestly foreign. Immediately you're at a disadvantage. You can't communicate what you need, what you want, what you need to get. Beyond that I'm glad we had some help. We had a relocation person walk us through a supermarket. And that was the first day we got there. And she taught us to be careful what you buy because for example we picked up something we got, thought it was yogurt and no it was actually sour cream. So we were going to get, you know six small things of sour cream and we would've realized later. She taught us to try to look at the containers and helped us a little bit to prepare us for grocery shopping which was, you know, really difficult in the beginning. But we kinda made sure the kids were unaware of how difficult this part was. We didn't want them to have any prejudice about our new home, or the country we were in, so we made light of the difficulties, like the language. Only at night with my wife would I complain about how insane it was. Like, the fact that I actually tried to speak German only to be corrected constantly or how cold I initially found the people. I think the kids thought it was quite easy. They loved the parks and the zoo and the tram-which at first we hated because it was soooo different and the language, it was difficult to get around. The kids still say the best part was going to the zoo, the park and riding on the tram, all things we did a lot of in the beginning, because we were too scared to drive too far (laugh). I think we hid it well in the beginning...for the kids".

Kenichi added that one of the key experiences was his kids' difficulty in adjusting to the new school, mainly because of the language. He shared:

The hardest part was the linguistic part and part of the travel. But amazingly they really absorbed really quickly and it seems like the language is no problem now. In fact I think from general conversation they are far, far much better than me.

Atsuko admitted that the experience was scary at first because of the different practices and language they had to adjust to. She stated:

Well, we were afraid of going out, going outside because of the language and having to find a house to get settled, so it was very scary. We were afraid to use English and get out. Also we came in August and was very hard because a lot of people were on vacation and we had to get ready for school in a month and that was hard because it was August and there wasn't much time.

Kazuhisa stated that the difficulty was mainly on the language because of the communication aspects they had to deal with. In his disclosure he revealed the interaction between the difficulties he experienced in his initial transition and how he managed that difficulty with his children:

The language was difficult for me I would say... but really it is not the language but the communication. I am fluent in English but when I say communication meaning that, that, that well let me explain. In my assignment I was transferred to the finance department, but I did not have finance background even though I went to business school. I had never done a finance job, so there was a lot of things I didn't know... it was all new and the finance type of communication were new, but I had to function. I struggled for the first 12 months. If I did it all in Japanese it would be much easier but having to do it in English is difficult. It's like having a new function at your job and having to do the new function all in a language that is second to you... I know English but it's hard to use

English and tackle a new type of job both at the same time. Would have been easier to do a new job function all in Japanese first. The children and my wife would ask me in the beginning how my day was and I would say fine, but my wife said I did not look fine and we all would have a stressful night. I saw this in the beginning and immediately changed my attitude. This was a premier experience for me, for my family and I did not want it to be more problems or more difficult. So the hard parts in our transition and in my work transition, like language or driving or directions I would not go home and complain about. So then when I say I had a good day, my wife, my children believed me and my face smiled too. It made me believe it too.”

Theme two: shock and awe, differences in culture. The second significant invariant constituent that emerged focused on differences in culture. This was drawn from the responses of nine out of the ten participants, identifying it as the second theme for the first research question, which focused on the expatriate family’s experience of transition to a foreign country. Differences in cultures, reflected the experience of expatriates being shocked and/or awed with how different the values and norms of the host country were from their country of origin. This theme was clarified by breaking it down into two more defined sub themes: (1) how each family either struggled and rejected what they identified as cultural differences or (2) how they gave in and accepted the differences in culture between their country of origin and host country. Michael stated that his family’s transition experience mainly involved differences in cultures. He stated:

Every early experience and truly all of our experiences had to do with cultural differences. I found the Swiss culture to be highly white male chauvinist. Since I was white and male I was good to go. For my wife, this had to be difficult at times. For my

kids, well they didn't know any better. Even the Swiss women seemed to be biased towards white males making all the calls. I thought the Europeans were cultured and worldly? NOT! The only discrimination I felt was with the Swiss and their damn rules. If you crossed the street wrong, someone would quickly tell you how to do it properly. When I first got there I would say... "so sorry"...when I was getting ready to leave [back to country of origin]I would get back in their face and tell them to basically "Fuck-off" (sorry for the negative words here). I did, however, witness massive discrimination against women and Asians. This occurred in the office and on the streets. The most common example in the office was any business 'suggestion' or 'idea' from a woman or Asian was quickly dismissed. Women also seemed to only have administrative roles and not management roles unless they were from the UK or the USA. As I suggested earlier, the culture in Switzerland, and Europe for that matter, is highly male chauvinist. And I was really in shock and awe about how pervasive this was...you could see it by the clothing---women wearing tight, short skirts as business attire and in high school...in fact I refused to buy my little girl clothes there as I even found clothes for girls to be suggestive and highly sexist. Oh, I think you could find examples everywhere and I was and am a little shocked how sensitive I was to this. I can only imagine what any of the women, well foreign women, were thinking.

Lauren added that the cultural rules in Switzerland made it more difficult for them to adjust upon their transition. She stated:

The rules! Just a lot of different rules living there. Especially for children in terms of their behavior...not being able to yell while at home which was different from when we lived in U.S. in our private home. And it wasn't even yelling! But they considered

regular children being a bit noisy. That was hard and with two young, active children I struggled with it. Could never totally accept that one. For my husband, I think it was the fact that he had to work with a more international crowd of co-workers and that was difficult. He didn't really have that experience prior to going so that transition for him was hard. And his travel. Because again, he was travelling a lot all around Europe and that was an adjustment for him. Lots of different personalities and accents for him. How to shake hands, when to look into the eyes...I think he had cheat sheets in his pockets at work meetings.

Yumi emphasized her experience dealing with the differences in culture, especially on the status of women in society:

I noticed that U.S. woman seem very strong. Mean they do so much...work; take their kids everywhere and even associate very well with men. That is very different here from Japan. Men and women work together in same jobs and do it with same respect. I like that. This makes me want to try and use English, in the beginning, because it is ok for a woman to use her voice and talk, not so quietly, or reserved. It made it easier for me to make mistakes with language and other things because women are treated fairly and can speak up. Sometime in Japan I feel my place as a woman and don't go more than that so that I don't make a mistake and make attention to myself. At first this was hard to see women like that in the U.S. I was shocked and worried what would happen if I worked with men like that or was so strong. It was difficult at first and scary to see, but I soon like that part and in our transition I had to be more strong, by doing stuff like going to the bank, driving, talking to people in English. Difficult at first but good. Makes me feel women can, can do anything, everything.

Tim struggled to accept cultural differences he found rude or that impinged on his rights, while easier to accept other cultural differences. He stated:

Like I said before, I would *try* and speak German, the language in our host country. I thought this was great but I was shocked when I was making honest attempts at using the language, at communication and then got rudely corrected. Who does that? I think that's different from my home culture. I was shocked! Maybe a smile. Some encouragement for trying? No. Many times the person would just break off into English, which by the way, I did **not** correct them for their poor pronunciation or accent! That was, I believe, a cultural difference I was just shocked by and could not get over. So I stopped my German language classes. I also hated that they had quiet hours or days in which you could not talk loud outside in your own patch of yard or do laundry, mind you are inside, your own home! Humph....but culturally I did agree and I really enjoyed all the holidays, vacations and cultural atmosphere regarding taking time out from work. Now some did take it too far and not work hard enough, but it was nice to have more of a balance and just have time off. Our office would just shut down, literally close for two weeks around Christmas and then again one week for ski holiday in the winter and during Faschnacht, the spring carnival. At first it was weird, having the office just close down. But, I did as they did and took the time off.

Theme three: the expatriate community was a little slice of heaven. The third theme emerged from the second research question, “How do expatriate families cope with the experience of transition to a foreign country?” It was found that the participants dealt with the transition by surrounding themselves with other expatriates they met in the host country to help them adjust with the new changes upon transition. This theme was deduced from nine responses

out of the ten total sample population. The break down of invariant constituents found in response to research question number two, and corresponding number of occurrences can be seen in Table 3.

Table 3	
<i>How Expatriate Families Cope with Transition to a Foreign Country</i>	
<u>Invariant Constituents</u>	<u>Number of occurrences</u>
The expatriate community was a little slice of heaven	9
We never talked so much as a couple in our lives	10
We did everything together	10
Language acquisition	2
Comfort items brought from country of origin	2
Lists of what the expatriates needed to do and written forms to help organize	2
Having co-workers who were willing to offer their advice and knowledge to help them adjust in the host country	2

To understand how the families more specifically experienced theme three as a way of coping in their transition to a foreign environment the following three sub themes were identified: (1) decrease in stress; (2) access to comfort items; and (3) normalcy.

Nicole captured the essence of this experience in her statement:

The expatriate community was a little slice of heaven. I think that was true for everyone, every family there. I knew, we knew that we wanted to live in an expatriate community prior to going over because we wanted things to be easy and we did not want our kids' lives to change dramatically by immersing them into a new culture 24-7. However, I did not know how comforting the experience of being an expatriate could be until I was

totally stressed and found so much comfort in the expatriate community. It was lovely. Friends, support, understanding, gossip [laugh], I found really good relationships in that community that got me through a lot of difficult times and made for fun memories. It was like a slice of Heaven in the middle of a sometimes Hell.

Michael, a management executive from the United States, stated that his family coped better by surrounding themselves with other expats who understood their experiences and difficulties:

The IS [international] school and ex-pat play groups contributed highly to their [his family] experience in Switzerland. This was good! Overall this was fine. There was a company that provided local support. Never used it--don't know anyone who did. This was fine, but a majority of the effort and support came from other ex-pats. That was our saving grace. It helped to cope with everything more than anything else.

Karen, an American housewife and business owner, emphasized the importance of having other expats to better cope with transition by decreasing stress, accessing comfort items and adding a degree of normalcy to their existence abroad. She said:

Other expats. When the kids started school in late August we met a lot of ex-pats. Plus they had a regular schedule, which made it easier--we would meet after school with other kids and other English-speaking families and that really helped. We shared stories of about our adjustments and the language and different things and that really helped. Knowing I wasn't alone, especially since I lived among all the native people of the country, it was nice to have a spot to meet and talk to other people who spoke English or who were from the United States, whom I could relate to, to just have in my space. I easily connected with other ex-pats. There was a substantial need to do so and I really, really valued those relationships and for me are lifetime relationships now. Those

relationships really decreased my stress. Gosh, and we all benefited from being able to get home items, like I often baked chocolate chip cookies, with real chocolate chips that you could only get from the states. My husband would smuggle them in from his trips stateside, like they were gold! Other U.S. expats had cheerios and would happily share—great for those with small babies. You couldn't get cheerios there. I was the lady that made lots of ice in my freezer because I had a large American like refrigerator, rare, but we got one, so I had room to make and store ice...which was unheard of! So I would buy Diet Coke in France and Germany and my American ladies would come over and we would enjoy ice-cold glasses of Diet Coke. Ahhh-nice times. And things were just made normal. We could swap American movies, talk sports other than soccer, trade People magazines, talk about Oprah or the presidential election or how you cook chicken your kids and your husband will eat! Before moving I had really good relationships because I lived in a really nice town and lived in a really nice area and it was close knit. I must say that since moving from our abroad experience it has been more difficult to form supports since coming back to US. I find it hard to connect here because maybe I don't have the need in terms of support. I know the language I know the culture. But maybe also it's a little different now that I moved abroad. I really miss those relationships with those people that I met abroad...those expats. They were so helpful for the transition there and back home. I don't speak to them that often but they are probably my closest friends.

Kenichi added that it was indeed very helpful to have expat friends who aided them in adjusting in their new home and host country:

In the first few days when we were living in the hotel, temporary housing, we received a phone call from a Japanese wife who was married to a Chinese-American. And we found

out they were living close to our area. And she invited us to a birthday party. And there were other Japanese and Japanese related families. That really gave us a great comfort and comfort for our mind because it gave us some support in the new town and connections to people that could understand and relate to us and that was really wonderful. Another one was a colleague in this company who had experienced living abroad; he had lived abroad in Japan. Another ex-pat. So he kindly coordinated with me and our boss and help work out some flexibility for me in the first month or so with my boss so I would have some flexibility with my transition and my work. So I could set up things like bank account and school and things with my family and give my support to my family and not have to worry too much about the stress of my job at the same time. And that was a good thing.

Yumi stated that from her experience, Americans that were ex-pats or other ex-pats were very friendly which made it a lot easier for them to cope with the newness of their new life and have some normalcy:

We have good access to the vegetables and meat and seasonings everything that we use in Japan. Most are available here. That is important. And I feel that the company my husband works for provides good supports to the employees, the ex-pats here. They helped connect us to other ex-pats. Some from America. Many from other places like Japan, Asia, India and Europe. They all helped us rent the furniture, with how to lease the cars. And so that is good support for us. I really say that the expatriates in our community were life saving. We had coffee and tea and talk and exchange idea. They became our good friends and like family when my husband traveled.

Theme four: we never talked so much, as a couple in our lives. The fourth theme that emerged from the study was an increase in verbal communication between husband and wife as a way to cope with the transition and adjustment to the foreign environment. This was experienced by ten of the ten participants. Three sub-themes were found for theme four, which further captured the richness of the theme and the experience of the families. These three sub-themes were: (1) Communication about the kids, (2) Communication in our native tongue, and (3) Communication about us.

Nicole talked extensively about how noticeable the increase in communication became between her and her husband Brian. She stated:

Brian typically is not a wordy man. Before moving abroad we had a great working relationship. He always travelled a bunch and I held down the home and the kids. He questioned little, asked little and things seemed smooth. Soon after moving abroad, I think Brian could sense, we weren't in Kansas anymore [laugh]. He still travelled quite a bit but now instead of calling for 5 minutes and talking to all of us, me... Matthew and Zoe [the children], he would speak with me, solely for like maybe 15 minutes, which was HUGE. He asked me about my day, what was hard and really if I was ok. He realized pretty quickly that the experience for me was much different than the experience for him...I had to negotiate all day in an environment that was foreign speaking, while he spoke English. I had the kids. Sometimes I would not speak with another English speaker for what seemed like forever. I think after our initial transition when I complained about all of this, he actually listened. And then this evolved to us talking about it. We had lots of conversations about it rather than the initial complaints, arguments and stress.

Nicole further spoke about her experience of communication with her husband regarding the children:

What really changed and helped me cope was that Brian and I talked about the kids incessantly. The kids and school and the kids and everything as opposed to me just telling him about a doctor visit or a crisis or specific achievement of one of the kids. Now the life and times of the kids abroad was a concern or a factor that brought us closer in communication. Brian and I were always talking about the kids, what they did, what they didn't do, what they ate, school, if they were happy, their friends...I think prior to our move Brian could name one, maybe two friends of mine and the kids combined. Soon after our move, he knew everyone we spoke about!

Brian corroborated his wife's sentiments:

I would say that as a couple, well...we never talked so much as a couple in our lives. I found myself asking about everything Nicole and the kids were doing because I soon learned that things were so different. And that things could be very difficult and isolating. Even though we lived in a little English-speaking ghetto I really had no idea what my kids and wife were experiencing. In the States, I felt I kinda knew what life was like for them. Abroad...I quickly realized that on a given day I had no idea what they might run into.

Karen, mother of two, married to Michael expressed the importance of communication with her husband:

We lived amongst all German-speaking locals. I could not drive, as I have an eye condition that limits my ability to see, so I walked or tram-ed it around with two kids. Thus I was always thrust into a foreign speaking world until I shut my doors. Talking

with my husband was like music to my ears. We could use slang. He gave up on learning German so he happily liked to cuss or say whatever in English...it was his form or freedom or revenge but for me it was comfort to speak with him in English, my mother tongue [laugh].

Karen further went on to discuss the importance of increased couple communication. She stated:

We did quite a bit of “us” conversation. Yes we talked about the kids, but we did what I learned from a fellow American, a social worker was ‘self-care’. Michael wanted to know how I was, especially with my eye condition. He never wondered in the states if things were challenging for me-he took that challenge for granted---but all of a sudden, he wanted to know how it was for me abroad. Being foreign we talked about how things could be isolating...maybe if we were in a different country or lived with more Americans it would have been less but this got us talking about it. We actually seemed to hang out more. We watched English T.V shows or movies when the kids went down to sleep and actually conversed about it. Back home we didn’t make time for that. I asked him about work but it was less cursory. I wanted details. I asked him for the first time in years if he was happy. After so much initial stress with the move I wanted and needed to know he was happy. That we were happy. I think we found asking and talking about it was the best way to know.

Atsuko spoke about how communication at home become very important:

When Kenichi would come home from work it important that we spoke about everything...the kids, his job, my day. This would be the first time for both us to talk in Japanese all day. I would try and speak English even with Koich and Itaru, so my

English get better and better. So when Kenichi come home we talk, and talk in Japanese...and sometime English. I tell him so much about the kids. More than if we are back in Japan because he knows what their day is like in Japan. Not in United States.

Kenichi also stated that communication at home became very important:

Oh my...I learned a very American saying, "Happy wife, Happy Life" [laugh]. Talking to my wife after work became very important. It made her very, very happy. Otherwise she wants to phone call Japan everyday and that is very expensive. Talking to her also saves me lots of money [laugh]. But we talked to each other about everything. The kids, a lot. But what happened in our new town, the groceries, the funny stuff, the new stuff. I know she is happy even though it is hard and she knows I like my job. These are thing we never really focused on talking about before moving to the United States.

Lauren exposes that her experience with increased communication with her spouse abroad actually became instrumental in her ability to cope and eventually keep her family together. She stated:

Well Tim and I began communicating a lot more and more effectively. In the beginning of our transition abroad I think I complained an awful lot and he began to listen. He had little to complain about except for me [laugh], my unhappiness, or stress, or worry. So I listened. Soon we realized at the end of the day we really only had each other to communicate with...or we could take our problems to other English speaker but that could end badly, cause then we would be divided in a foreign country. We didn't come all the way across the ocean to end our marriage and divide our family...I knew affairs abroad happened and could see why. So we talked more with each other. At the end of the day that helped me cope with things...like the language or the kids or our dog...a lot

can stress me out in general so things were magnified abroad when everything is so different. Our increased communication also probably saved our marriage because after like eighteen or nineteen months I knew I had lived my expectancy abroad and needed to come home to the United States. The adventure was done for me. Tim and I were able to talk with each other at length and come up with a plan of action to return home. If our communication had not of grown so well between each other I think I would of just returned home with the kids. Instead, we talked about it and made a plan...I still returned home first, alone with our two kids. But Tim was soon to follow and we talked every other day by phone and email until he joined us. That was made possible because we had become closer.

Theme five: we did everything together. This theme identified the importance of socializing and partaking in entertainment as a family unit in distracting expatriate families from the experience of transition and coping to their host country. Three sub themes were also identified as : (1) Entertainment, (2) Travel, and (3) Social Community Connection. The expatriates shared experiences of enjoying more time as a family unit traveling or spending time with other families and friends as a valuable component of coping with the various stresses of living in a foreign country. Lauren recalled:

We did everything together. Tim, my husband, would never go to a grocery store with me in the States-it made no sense. But there, in Switzerland it was like a family bonding experience “Let’s see if we can get through the market together as a family in one piece”, it was like we were gladiators on a team together. I can tell you, it made things a lot more manageable, doable. The times I had to go alone were so much easier because we had done that together. But we did everything together, like bike ride, parks, ski, zoo, registrations for school, ...and those times we

did not do it together as a family, I would get one of my expats, a fellow wife and her kids to do it with me. Again I wasn't alone. So going across the border to shop in France or Germany, which was often stressful, I would grab someone in the same boat and it made it easier. I found I could do most things with my family or good friends.

Karen shared that travelling greatly entertained them as a family:

Oh we travelled all around Europe, I did scrapbooks, the kids did field trips in school, and I did field trips with my girlfriends to go grocery shopping in France and Germany or to buy napkins in France, or go to lunch with my girlfriends while the kids were in school. We did a lot together as a family to entertain the kids and ourselves and to escape the stress of everything like go to zoos and parks and ice-skating...made things more normal in a way because we focused on fun instead of being stressed or isolated or different or whatever...

Brian stated that doing different activities together helped them adjust in their new country:

Just being together. Doing everything together...we suffered through it together or just went out and did things but it was comforting knowing we, the four of us were there together.

Michael shared a similar experience of the other expatriate husbands, that family time became more abundant and more needed. He shared:

We went on a lot of bike rides. Walks. Played with the dog. A lot of outdoor activities, went hiking in the mountains. Some skiing. A lot of good family time. And I would say was more intense while we were there probably because we were limited in other things that we could do, so the stuff we could seemed like a lot. For example, on the weekends

we didn't have a house to take care of, stores closed early or not open at all, we couldn't do certain things, you know there was no football, no basketball games on T.V or to go see... didn't know about going to a lot of sporting events so instead we began riding our bikes and would ride for like three hours. Before long, we did not miss our normal weekend routines. That became our new normal. Being together like all the time or having friends over. Not a lot to do alone or rather, you didn't feel good just being alone. Kenichi added that the transfer even made the family closer as they had more time to spend together:

The fact that we travelled together and had each other in the beginning. That made the beginning much easier. It was relaxing and fun to do activities together as a family. Also the fact that both my wife and I spoke English that really helped. See because my kids could not readily speak English, we were able to do a lot with them, my wife and I, either alone or together. Us speaking English made it much easier than if only one of us could. My kids and family would say they really liked all the family time we had together.

Nicole emphasized on how travelling, socializing and entertainment played a very big role in their positive transition:

Oh we travelled. That was one of the best parts as a family, traveling together. My son played for the local hockey team, which was quite a great experience for him. I was part of a wonderful English-speaking playgroup, which helped me tremendously and became a very good support group. And the school provided a lot of connections in terms of outside entertainment for adults as well as children. This together busy time with family and friends preoccupied all of us and made it easy to cope with being away from our home-home. It wasn't until my expatriate friends started moving back home or away that

I realized how much this togetherness, our socializing really got me through our transition to living abroad. It provided the perfect distraction.

Yumi, noted how travel, entertainment and social engagements eased the move for the kids:

As parents we kept the kids busy. We travel whenever we could. The United States is so big with so much to see. So many different peoples here. We went to the Baseball Hall of Fame, my sons love baseball. We go skiing. Our sons not miss their home or their grandparents so much. We invited to parties and barbeques. Going into the city or different grocery stores together is fun because we get to see so much, there is so much in the United States and we talk all about it together as a family as we experience it. This makes it so comfortable for our boys and for us parents.

Summary

The purpose of Chapter 4 or the data findings and analysis section was to present a comprehensive exploration of the phenomenological experiences of the ten participants who represent families of parents and children. The main method utilized by the researcher to extract meanings from the ten interviews was the modified van Kaam method by Moustakas (1994), which consisted of seven steps. Five main themes and 14 sub themes were identified through the lived experiences of the participants. The first research question (How do expatriate families experience the transition to a foreign country?) centered on the initial transition to living in a foreign country for the family and elicited two strong themes. Theme one, “Keeping it together for the kids” was further described by its three sub themes: (1) Language/Communication, (2) Hidden emotions of parents, and (3) Normalized emotions of kids. Theme two (2) “Shock and Awe: Difference in Culture” included the two sub themes, 1) how each family either struggled

and rejected what they identified as cultural differences or (2) how they gave in and accepted the differences in culture between their country of origin and host country. The second research question (How do expatriate families cope with the experience of transition to a foreign country?) revealed coping mechanisms that the participants identified as helpful to the transition. This led to three other pronounced themes of the study which were; theme three (3) “The Expatriate community was a little slice of heaven” and included three sub themes (1) Decrease in stress, (2) Access to comfort items, and (3) Normalcy.

Theme four (4), “We never talked so much as a couple in our lives” and its three sub themes (1) Communication about the kids, (2) Communication in our native tongue, and (3) Communication about us.

Theme five (5) “We did everything together!” and its three sub themes : (1) Entertainment, (2) Travel, and (3) Social Community Connection.

Chapter 5 will present a discussion of the results and an exploration of the significance of this study.

Chapter V

Discussion and Exploration of Significance

In qualitative research, findings are revealed through multiple realities that are socially defined as opposed to quantitative research in which findings are explained through objective facts. Thus, in qualitative research, conclusions are not made but rather phenomena emerge and are presented and discussed. This section will discuss the phenomena uncovered from the participants in this study.

Methods and Findings

The phenomenological method was appropriate for this study as it is a method of analysis, which focuses on the lived experiences of the participants allowing for multiple perspectives and insights while considering the impact of the experiences on and within the greater context of the family and culture and environment. This is congruent with systemic theory (Bowen, 1978; Kerr & Bowen 1988).

As a result of the semi-structured interviews participants were able to give voice to their experiences and commonalities from all ten participants were revealed. These commonalities were carefully compared and contrasted revealing five specific themes and fifteen sub themes that predominated throughout all ten participant narratives. The qualitative analysis allowed for a rich examination of each participant's reality and understanding of the phenomena within their experience as expatriates. This provided the context for teasing out the common themes amongst the participants.

Ten participants were interviewed; six Caucasian-American and four Japanese natives. All were married couples, interviewed individually, which had experienced relocation to a

foreign country as a family (e.g. relocation with husband wife, at least one child) for a minimum of twelve months.

Data for the study was collected through a brief, self-report demographic form and an in-person semi-structured interview. Each interview lasted approximately 90 minutes. All interviews were audiotaped and later transcribed for data analysis. All data collection and transcribing was done by the principal researcher.

The data analysis revealed in depth, rich narratives from the personal perspectives of each participant. These perspectives gave voice to each family's experience of transition to living in a foreign environment. From these detailed narratives, commonalities amongst all ten narratives were revealed. These commonalities were grouped into the five most significant variables or themes experienced by the families. To better understand each theme, 15 descriptive sub-themes were identified.

Exploration of Themes

The first research question centered on the initial transition to living in a foreign country for the family and elicited two strong themes, which resonated with all participants. Theme one was identified as (1) "Keeping it together for the kids". This theme focused on the parents' initial need during the transition to normalize the experience and decrease the amount of stress for their children in turn, reducing the amount of stress for themselves. In order to negotiate all the new entities of a foreign environment, which consisted of such things as learning, adjusting and using a foreign language to establish the family's initial needs, the parents had to keep things as normal and stress free as possible. Theme two (2) "Shock and Awe: Differences in culture" reflected the experience of expatriates being shocked and/or awed with how different the values and norms of the host country were from their country of origin.

The second research question elicited coping mechanisms that the participants identified as helpful to the transition. This led to the other pronounced themes of the study. The first theme for this research question was (1) “The Expatriate Community was a Little Slice of Heaven”. This categorized the participants’ need for distinct expatriate communities within their host countries in order to cope with living in a foreign country. Theme two (2), “We never talked so much as a couple in our lives” captured the overall experience of increased couple communication among the participants.

The third theme (3) “We did everything together!” captured the experience of increased family activity and entertainment time that was a response to coping with concerns about the family’s adjustment and an ultimate result of increased communication between the couples and family members. Theme three also suggests that the participants dealt with the transition experience by surrounding themselves with other expats they met in the host country to help them adjust with the new changes upon transition. This is one of the three most interesting findings of the study because it highlights the relational aspects of the family experience. It demonstrates how important the health of the family’s systemic environment was to the family’s ability to cope with the new changes in their transition to living in a foreign country. The three relational aspects trumped the analytical, organizational or non-relational aspects of coping and adjusting to the transition. The theme indicates the participants’ main method of coping was by surrounding themselves with their support group or other expats.

The fourth theme, “We never talked so much, as a couple in our lives”, reflected an increase in verbal communication between husband and wife as a way to cope with the transition and adjustment to the foreign environment. Systemically, increased couple or parental communication (husband-wife) is related to higher degrees of experienced family cohesion or

togetherness. Thus, many families found that as parents (couples) had greater verbal communication with one another to deal with the day-to-day activities the family as a whole experienced a sense of greater family togetherness. Many of the participants reported feeling closer to their husband or wife after the move, which coincided with reports that there was an increase in verbal communication amongst the couple.

The final theme, “We did everything together”, reflects the greater experience of entire family cohesion (not only couple cohesion) while abroad. The participants found that they spent the majority of their social, non-work time with their families, as opposed to doing solitary activities or activities that involved friends or other social connections outside of their family members. Systemically speaking, this theme seems to be also influenced by the social context characterized in the theme, “The Expatriate Community was a Little Slice of Heaven”. For these participants, a coping strategy emerged that by immersing oneself in a successful expatriate community, one that is thriving, a family learns through those social cues or association. For example, if the Johnson family observes the Yee family doing family activities together and or communicating together the Johnson family is more likely to also adopt those positive coping strategies because they are in the same or similar context/environment. Thus, the participants' experienced a way of coping by spending more time physically (in direct contact) with family. This, in-turn helped them cope and adjust away from their home country. This theme identified the importance of socializing and entertainment on distracting expatriate families from the feeling of culture shock during their transition to their host country. The expatriates shared experience of enjoying more time as a family unit traveling, doing activities and spending time with other families and friends within their “foreign” community as a valuable component of coping with the various stresses of living in a foreign country.

Limitations

Both quantitative and qualitative research designs have threats to the internal and external validity of a study. In qualitative research this is referred to as the trustworthiness of the study. Credibility, dependability and confirmability are the means by which qualitative research maintains internal validity.

Credibility was developed by providing the initial transcripts, (written summaries), to all the participants for review and making any adjustments to ensure that they were accurate representations of the participants' experience. In addition, there was no prolonged or extended contact with participants outside of the research interviews and review of transcripts. This was done to ensure that a more meaningful relationship between participants and research did not develop that could influence the information gathered within this study. Although precautions to ensure credibility were taken, the possibility exists that, the researcher, in ways that have not been account for, could have influenced participants.

Replication of the qualitative research is inherently problematic in that a basic assumption of qualitative research maintains that knowledge and the social experience are always changing and being constructed. Thus, dependability must be accounted for by addressing the research's influence and impact, as well as situational factors that impact the research process.

In addition, confirmability of the study, speaks to whether the study is both reliable and valid. The aim is to have what quantitative research refers to as objectivity or in the case of this study, data that is not based on subjective interpretation. I attempted to do this by following the steps and criteria recommended and commonly accepted in the field as sound as outlined by Lincoln and Guba (1985). To maintain objectivity, neutrality and transparency as a researcher,

the concept of “epoche” was followed. To appropriately bracket, I constructed a personal biography, which included my assumptions, reasons for engaging in research, and a brief personal history.

In addition, a journal was kept, which included as a researcher, my feelings, observations, reflections, interpretations, challenges, and experiences with participants during the process. Although dependability and confirmability are inherently problematic in qualitative research, guidelines were followed to ensure to the best of my ability that these were maintained.

Transferability is qualitative research’s equivalent to quantitative research’s concept of external validity. External validity is the extent to which the results obtained from a small sample group can be extended to make predictions or generalizations about the entire population. The sample size of ten participants represented saturation, which is desirable for a qualitative, phenomenological study. Although the sample size appears relatively small, for purposes of this study design, it met the saturation criteria. Additionally, all the participants reviewed their transcripts and validated that the interpretations of their experiences were accurate.

Finally, cultural limitations exist within the sample. The sample represented two home countries of origin, Japan and the United States of America. A larger sample size consisting of participants from a wider array of countries of origin might have given more confidence to generalizations made to this population of expatriates. Also, all participants were gathered from one corporate entity. Although the company was a large multi-national company, it is unknown if participants were familiar with one another and one could hypothesize that the company itself maintains a type of culture or social environment that might influence this population of participants.

My Experience as a Researcher-Participant

My interest in this study evolved from my personal experience living abroad with my family and my observations of other expatriate families and individuals during their relocations. Thus, this study provided an opportunity for me to provide insight and perspective as a researcher-participant in this study.

In qualitative studies the research-participant plays an integral part of the process. As the research-participant, one must be mindful of the need to remain fully open to all possible experiences of the participants, while using his/her lens to pull out meaningful phenomena forming themes that help characterize each experience into a larger experience shared by all the participants. It's a fine line between researcher-participant. In this role I must acknowledge that what I chose to pursue for further inquiry during each interview and the information that spoke to me as themes was not only shaped by many rich narratives and commonalities presented by the participants but also, to a degree, my own perceptions.

In this role of researcher-participant I was mindful to follow the process of epoche, which refers to bracketing my preconceived ideas and emotions in order to understand the phenomena through the voices, or lived experiences of the participants. In order to adequately do so, I kept a journal. This proved extremely important when identifying potential themes. After reading and re-reading the transcripts, I pulled out themes that were important to me as the researcher. After review with my advisor and several re-readings of transcripts and draft writings, I was better able to hear the voices of the participants and identify what emerged as their shared experiences. In fact, I found it best to code the themes in the voice or actual words of some of the participants. The richness of some of their words seemed to best capture the essence of the experience for all

of the participants. Thus, it became as if the participants were actually speaking their experience in each identified theme.

This process of epoche (journal keeping) was key to me. It was essential for my transcript reading and draft writing and in keeping me unbiased when identifying the themes spoken by all participants. Without this process, I could have easily inserted my own perceptions and experiences. Although tedious, I believe this process of qualitative work was very valuable and a perfect fit with my systemic framework. As a systemic researcher, I think about the experiences of the participants in the context and framework of larger operating systems, whether it's the contexts of the family, culture environment or society, added a richness to the content. To further check my perspective and myself I sent a copy of each participant's transcript to them for "member checking" for review of content. Each participant agreed with the transcripts, that each narrative was indeed what and how they had spoken within our interviews. These were some of the highlights from my process as a researcher-participant in this study. It is my hope that sharing some of my thoughts and actions regarding the process provides the reader with more understanding of the content within this study.

Implications for Future Studies

A review of the literature conducted before the initiation of this research study confirmed a paucity of material examining the experiences of expatriate families as compared to the numerous amount of literature regarding the experience of the expatriate worker. This research study is amongst the first of its kind to examine the experiences of the expatriate family and highlighted what and how these "families" coped with the transition. Thus, from a systemic perspective it is imperative to further explore and consider the overall functioning of the family to confirm the findings observed in this study.

During the final part of the participant interviews in this study, each participant was asked if there was anything that they wanted to add or wished they'd been asked. All, but one, male participant added that in the future they hoped that issues of transition back to their country of origin would be researched and studied. This suggests a need to explore the experience for relocating back home for such families in order to identify what variables make it more or less difficult and hopefully to explore what resources can be provided to support these families.

There are also cultural differences to further explore. Four of the participants of this study were Japanese. During the consideration of their expatriate assignment, they were instructed by their companies to leave their family member(s) behind as the family would be a distraction and the home "community" or family would provide support while the worker is abroad on assignment. The four Japanese participants all commented during the interviews that such attitudes are changing in Japan and that more families are accompanying the working spouse during expatriate assignments. Quantitative and Qualitative studies of this culturally distinct cohort would be of keen research interest.

The book, *Third Culture Kids* (1999), shared stories of children of expatriate families, and how their identities were shaped by their relocations to foreign environments. The participants of this current study all have young children. In another 15-20 years these children will be young adults, college students, our colleagues, parents and maybe expatriate workers. Their early experiences abroad and how they coped and negotiated such experiences shaped their view of themselves and the world around them. According to stories in the book, *Third Culture Kids*, these adult children find moving in and out of a culture much easier and actually quite normal and comforting. They often seek this type of lifestyle, forming culturally an international

identity. Follow-up studies, to look at the experiences and characteristics of grown expatriate children would be a robust area of research.

A few families shared stories of expatriate families who divorced or separated during assignment. Although no statistics could be found regarding this, it would be an interesting area of inquiry, regarding the negative outcomes of an expatriate assignment. Lastly, future research should consider a comparison of the experiences by gender

Clinical Implications

Cowan and Cowan (2000) examined couples over a 10 year period. In their research they found that couples with children that experienced a stressful transition became more aware of their resources or lack there of, to cope with the stressful situation. Furthermore, Cowan and Cowan found that a stressful transition often acted as an amplifier for pre-existing difficulties in their marriage. Thus, if a couple is already challenged with poor communication, bad coping mechanisms or any other difficulty, a stressful transition, such as in the case of this current research (an international move) would only exacerbate their stress and their ability to cope with such a situation. This is when a psychologist or therapist can be utilized to work with such a family. Identifying that this might be an area of risk for the expatriate population is an important finding and one that sponsoring companies and psychologists that work with this population must be aware of.

Patterson and Garwick (1994) cite the work of Rueben Hill as being instrumental in field of couple communication and family stress. In 1949, Rueben Hill conducted his original study with families after the Great Depression. He observed that those couples that had experienced a stressful transition (e.g. during the Great Depression) yet talked amongst themselves and/or with a counselor, therapist, or clergy person about their stress coped better. His findings are still

recognized to this day in marriage and family communication and stress literature, commonly referred to as family stress theory. These findings suggest that the impact of any specific stressor in a family's transition, (e.g. an international move), is likely to cause the family unit, or the couple, increased stress and an increased inability to cope with the stress if there is not adequate communication between the couple and/or with external supports, such as psychologists, therapists, or other mental health specialists.

The emphasis on the importance of communication between the couples in this current research is supported by the findings of Cowan and Cowan (2000) and Patterson and Garwick (1994). This implies that psychologists and therapists have a crucial role to play in the lives of expatriate couples and families throughout their transitions abroad.

In addition, it is important to consider the influence of family systems theory on this current research. As the guiding perspective of the researcher, a basic understanding of family systems theory is essential in appropriately viewing the contexts of the participants and understanding the significance of their shared experiences. Family systems theory is a body of knowledge that has risen out of the observations and work with individuals and their families from clinical and counseling professionals for over 60 years. The theory suggests that individuals cannot be understood in isolation from one another. Families are considered systems of interconnected and interdependent individuals, none of whom can be understood in isolation from the system. A mobile can visually and metaphorically represent this system. Much like a mobile, in which one string is attached to another and to another, one can not touch one part or string of the mobile without causing a reaction or movement of another part of the mobile, or system. All parts are connected and influence or are impacted by one another. Thus, the theory suggests that individuals cannot be understood in isolation from one another, but rather as a part

of their family, as the family is an emotional and physical unit, with each part understood most accurately through the consideration of its entire context.

According to Bowen (1978), a family is a system in which each member has a role to play and rules to respect. Members of a system are expected to respond to each other in a certain way according to their role, which is determined by relationship agreements. Within the boundaries of a particular system, patterns develop as certain family member's behavior is caused by and causes other family member's behaviors in predictable ways. Maintaining the same pattern of behaviors within a system may lead to balance in the family system, but it may also lead to dysfunction. System, or family dysfunction can often be seen when the system experiences changes also known as transitions. These transitions can come in the form of social, emotional, or even physical changes for family members or within their environment. For example, an expatriate family moves to a foreign country and the wife/mother must give up her full time job and take up more at-home responsibilities to support her family in the move, while her husband increases his time and responsibilities at his new job abroad. The change in roles may maintain the stability in the relationship, but it may also push the family towards a different equilibrium. This new equilibrium may lead to dysfunction as the wife or husband or children may not be able to maintain this *new* role over a long period of time.

As one can see viewing the individuals of a family from a systemic perspective dramatically shapes the way in which one interprets the social, emotional, physical and environmental transitions they experience and how they cope with these. In particular, this perspective allows one to consider and incorporate a multitude of differing resources to support and aid expatriate families. This systemic perspective is essential in understanding how past expatriate research has lacked in its examination of the experiences and needs of the expatriate

worker in transition. According to this perspective, neglecting to examine the expatriate worker as part of a family system when conceptualizing the needs, strengths, productivity, transition and does not adequately account for the full experience of such individuals and families.

Utilizing a systemic lens, this study provided rich information from lived experiences of expatriate families. It yielded useful findings that can help psychologists, mental health practitioners, teachers, MNC's and families faced with prospects working and living in a foreign environment. From embracing a qualitative research approach, this researcher developed a deeper understanding of the multiple experiences of expatriate families. By no means is this conclusive, rather, it provides a rich framework to begin more focused work and attention towards this population. The hope clinically is that future support and attention can be given and designed for such families. With our wide, diverse world becoming smaller through travel, or relocation better understanding of how a family transitions and copes will be so valuable when working within this population. This research can act as a springboard for discussion, thought, inquiry and care of how clinical practitioners can better support and understand the growing expatriate community amongst us.

Systemically, healthy families, ones that are able to meet their emotional, social and physical needs can lead to healthy communities. As a family specialist and systemic thinker, this researcher aims to work with individuals and families in order to increase the amount of healthy individuals, families and communities. This study has demonstrated that there are far greater implications than just helping a few families adjust for a year or two to a foreign environment.

Closing Remarks

In qualitative research, findings are revealed through multiple realities that are socially defined as opposed to quantitative research in which findings are explained through objective

facts. Thus, in qualitative research, conclusions are not made but rather phenomena emerge and are presented and discussed.

As commerce becomes increasingly globalized and corporations seek opportunities outside their domestic corporate headquarters, it is likely that many more workers will elect or be encouraged to make embark on expatriate assignments with their families intact. Thus, by examining the experiences of such families and further studying their needs, concerns, and coping mechanisms will facilitate the transition for future families.

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Appendix

Appendix A: Autobiography/Epoche

Moustakas (1994) describes the researcher as an instrument who collects and interprets data about phenomenon from a particular phenomenological perspective or lens. This phenomenological lens informs the reader of the researcher's perspective since interpretation from different researchers may vary. The phenomenological lens in this study is derived from my personal perspective, and is based on my experiences as a teacher and learner of psychology as well as my experience of living abroad with my family.

My name is Kwamia N. Rawls. I am currently completing my dissertation as part of the requirements for a doctoral degree in Family Psychology from the Department of Professional Psychology and Marriage and Family Therapy at Seton Hall University in South Orange, New Jersey in the United States. I am married and have three children; two boys, ages 11 and 8 and a 2 year-old daughter. In 2004 my family of four relocated to Switzerland due to my husband's job. We spent approximately two years living in Switzerland and experiencing life as an expatriate family.

I have always had an interest in travel and in diverse cultural experiences. This was fostered early on through my travels throughout the United States and Canada, visiting family and friends. I learned to appreciate the vast diversity and distinctiveness of North America as well as those within my large extended family. My father was offered an expatriate work assignment when I was nine years old. My parents declined the offer because our family had already endured five moves within the United States and because my brother was about to enter high school. They felt our family did not need another transition. Ironically, about twenty years

later my husband, two young children, and I embarked on a similar work-related assignment abroad.

I became interested in studying the expatriate experience after having lived abroad with my family for two years. Prior to our expatriate initiation, I searched for peer-reviewed research articles or other resources to help prepare for our transition. I found very little that was helpful in giving us an idea of what to expect. I found little more than some self-help articles and many studies related to expatriate workers, their work productivity and the benefits of their productivity their company. What was missing was general information regarding the shared experience of expatriate workers and families in transition. I wanted to know what the experiences were like for the families, not for the companies. This became especially important for us as a family in the first year or so of our move.

All in all my family had a wonderful experience. It was full of growth-inducing events and experiences. Some of these experiences were more pleasant than others, like being able to visit many countries in Europe and developing friendships with our three neighboring Swiss families, each culturally representing 3 different regions of Switzerland (e.g. the French, the Italian and the German regions) that our family could learn from some more difficult, but all rewarding in their own meaningful ways to my family. Some experiences were more difficult, like having our five year old son break his right arm, requiring two surgeries, after only living abroad for two months and experiencing the month of November with no national Thanksgiving celebration while trying to “invent” our own Swiss-version of Thanksgiving, without extended family members and familiar food and football! However, all the experiences were rewarding in their own meaningful ways to my family and me and we truly enjoyed our sojourn in Switzerland. Interestingly, from interactions with other expatriates I heard numerous stories,

many of them not as wonderful or endearing. Although we shared some of the same stories, struggles and triumphs, I left our discussions wondering, is there a “shared” experience of transition? I wondered whether there were certain common variables that stood out amongst expatriate workers and families during their first expatriate transition experience? My thought was that the identification of even a few of the most important factors facing expatriate families in transition to life in a foreign country could help others, who, once like myself, were making that “unknown” transition.

Therefore, I decided to focus my dissertation on exploring the experiences of expatriate families in transition to a foreign country. Perhaps potential expatriates, expatriate families, therapists, psychologists, companies, and schools that educate the expatriate community could utilize such information to better meet the needs of expatriate families. After experiencing the ups and downs of such a move and having many expatriate friends that struggle with the same juxtaposition of the expatriate experience, I thought it was an area in need of exploration. If I were asked to guess what may be the themes that will emerge from this study, I would not, of course, be able to know, in advance the details of any couples’ unique responses. However, I will be surprised if the following (in broad outline) are not mentioned by the participants as playing a role in their pleasure or discomfort in the early months of the expatriate experience: language issues, gender issues, work-status, schooling issues, religion/spirituality, healthcare, loss of identity and safety issues.

Appendix B: Demographic Data Collection Form

Code: _____

Worker Demographic Data

1. Gender: _____
2. Age _____
3. Country of Origin: _____
4. Race: _____
5. Ethnicity: _____
6. Please state your religious affiliation, if any: _____

7. Work/Profession: _____
8. Please list the countries you've lived in, the length of time you lived there, and your age during the time you lived there:

9. Are/were you fluent in the national language of your host country?
☐ Yes
☐ No

10. Is this your family's first expatriate assignment?

☐ Yes

☐ No _____

11. If no, please indicate how many family assignments you have

completed: _____:

12. Which assignment does this survey represent for your family? _____

13. Are you currently on this assignment? Yes No

If yes, how long have you been on this assignment? Months: _____ Years: _____

And what is the projected length of assignment? _____

If no, when did you complete it? Month: _____ Year: _____

14. Number of children: _____

15. Please list each child's age at the beginning of this expatriate

assignment: _____

16. Were any children born while on assignment? Yes _____ No _____

17. If yes, how many? _____

Code: _____

Spouse Demographic Data

1. Gender: _____
2. Age _____
3. Country of Origin: _____
4. Race: _____
5. Ethnicity: _____
6. Please state your religious affiliation, if any: _____

7. Work/Profession: _____
8. Please list the countries you've lived in, the length of time you lived there, and your age during the time you lived there:

9. Are/were you fluent in the national language of your host country?
☐ Yes
☐ No

10. Is this your family's first expatriate assignment?

☐ Yes

☐ No _____

11. If no, please indicate how many family assignments you have

completed: _____:

12. Which assignment does this survey represent for your family? _____

13. Are you currently on this assignment? Yes No

If yes, how long have you been on this assignment? Months: _____ Years: _____

And what is the projected length of assignment? _____

If no, when did you complete it? Month: _____ Year: _____

14. Number of children: _____

15. Please list each child's age at the beginning of this expatriate

assignment: _____

16. Were any children born while on assignment? Yes _____ No _____

17. If yes, how many? _____

Appendix C: Interview Questionnaire**Interview Questionnaire**

1. Factors leading to initiation of expatriate work assignment and experience: For the following questions, please try to remember the first time you were approached about the possibility of accepting this expatriate work assignment.

- a. Where were you and who was involved in the initial discussion?
- b. What was your initial response to this expatriate work assignment?
- c. If your spouse was not included in this initial discussion, how and when did your spouse find out about the possible assignment?
- d. What was her/his response?
- e. When were the children informed of this expatriate assignment?
- f. Were the children involved in the decision to accept this assignment? Please explain your decision to involve them or not involve them in this decision.
- g. Describe the response of your children to your acceptance of the assignment?
- f. What factors helped to make the decision to accept the assignment?
- g. What was the reaction from friends and family? How did you feel and think about these reactions?

2. Expectations and preparation for expatriate work assignment and experience

- a. What expectations did you have about your relocation?
- b. What do you recall were the expectations of your spouse about the relocation?

- c. What do you recall were the expectations of your children about the relocation?
- d. Did you own a home before you left? Did you sell it? Rent it? Why or why not?
- e. What items did you choose to bring with you from your home/country? How did you make those decisions?
- f. What items did your children bring? How did you (or they) make those decisions?
- g. Please describe what actions you took to prepare yourself and your family for the move.
- h. Please describe any outside supports you had during this process.
- i. Please describe the actual move for you and your family.

3. Arrival in host country

- a. Describe what you remember about your first experiences in your host country?
- b. What was hardest for you?
- c. What was easiest for you?
- d. What helped you most?
- e. What was hardest for your family members?
- f. What was easiest for your family members?
- g. What helped your family most?
- h. What would you advise other workers/families who might be considering expatriate work?

4. Daily factors of living in a new context

- a. Describe your housing situation while in your host country. How does it compare to your previous housing situation (prior to relocation)? How did your

housing situation contribute to your overall experience?

- b. Was the acquisition and competency of a new language an issue for you or your family? Please explain how this did or did not affect your transition and experience.
- c. Please describe how safety issues impacted your transition and experience in your host country? For you and your family members.
- d. Describe how your gender (being male or female) impacted your transition and experience in your host country.
- e. How has your “work-status” contributed to your transition and experience in your host country?
- f. Identify and describe any factors that you believe specifically affected your children’s transition and experience in the host country.
- g. Identify and describe any experience when you felt discrimination during your transition or experience in the host country.
- h. Please describe what you and your family did for fun/pleasure during the transition and experience in the host country (e.g. sports, hobbies, entertainment, the arts, social events, media)? How did these contribute to your overall experience?
- i. How did food and diet contribute to your transition and experience in your host country?
- j. How did issues of health and medical care/services contribute to your transition and experience in your host country?
- k. Describe your economic situation during your transition and experience in the host country. How does it compare to your previous economic situation (prior to relocation)?
- l. Identify and describe your supports during your transition and experience in the host country? How do these compare to your previous supports (prior to relocation)?

- m. Please describe your satisfaction with your marriage during your transition and experience in your host country? How does this compare with your previous level of marital satisfaction (prior to relocation)?
- n. Please describe your satisfaction with your family as a unit during your transition and experience in your host country. How does this compare with your previous level of family satisfaction? Describe your experience dealing with friends and family members in your country of origin during your transition and experience in your host country.

5. Additional remarks

- a. Are there any other areas that we did not discuss that you would like to mention?
- b. Are there any areas that we discussed that you would like to discuss further?
- c. Would you like to provide any suggestions or questions that you feel would be helpful to the understanding of the expatriate transition experience?
- d. Knowing what you now know about your experience as an expatriate, if given the opportunity to accept this assignment again would you? Why or why not?
- e. Please identify or describe what ways would have made your transition and experience more successful.

Appendix D: Solicitation Letter for Multi-National Company

Dear _____

(Human Resources Director)

My name is Kwamia N. Rawls. I am a doctoral student in the department of Professional Psychology and Family Therapy at Seton Hall University, South Orange, New Jersey, USA. I am soliciting your help in the identification of participants for research I am conducting for my doctoral dissertation.

Explanation of the research and duration of participation

The objective of this study is to identify the most important factors faced by expatriate families during their transition to a foreign country. The identification of these factors may help therapists, psychologists, schools and sponsoring companies develop better supports and resources for expatriate families in transition. In order to do this I will conduct individual interviews with expatriate parents to uncover the richness of the expatriate experience, while defining the basic constructs that guide this population's transition into a new culture. Participants will complete a short, self-report, demographic form (recording general background information such as the participant's gender, race, country of origin), prior to conducting the interview. A semi-structured questionnaire will guide the researcher's interview. The interviews will take approximately 60-90 minutes and will be scheduled based on the availability of each participant.

Confidentiality

Before the initial interview all participants will be informed about safeguards to confidentiality and will be asked to sign a detailed letter regarding confidentiality and consent to participation. No participant's name or identifying information will be used in analyzing or reporting the content of the study during or after the study. All material gathered during the interview process will be confidential. Transcribed data will be stored on a password protected USB memory key and will be kept, with all other data, in a locked file cabinet in my office.

Voluntary participation in the study

Participation is entirely voluntary. A participant may withdraw from the study at any time, without penalty or obligation.

Anonymity

No identifying information regarding the participants will be recorded, so that one will be able to link the data to any individual.

Criteria for participation in the study

Participation is limited to married couples with children that have been relocated for work purposes to a foreign country by their employer. In addition, all participants are required to have

lived in the host country for no less than 12 months. All participants must be fluent in English, the language in which the research will be conducted.

Approval of this research study

The Seton Hall University Institutional Review Board for Human Subjects Research has reviewed and approved this research study. The IRB has acknowledged that the research procedures within this study adequately safeguard the privacy, welfare, rights and civil liberties of the people who will participate in this research. The IRB chairperson may be reached at (973) 313-6314.

Request

Based on the aforementioned requirements I am asking for your help in identifying possible participants. I will provide a written letter that can be used to contact prospective participants along with a contact information form requiring each interested participant to provide appropriate contact information that will be emailed directly to my attention. Thank you for your assistance in recruiting potential participants.

If you have any questions or need additional information regarding this study or the researcher please contact my dissertation advisor:

Ben Beitin, Ph.D., L.M.F.T.
Seton Hall University
Department of Professional Psychology and Family Therapy
Jubilee Hall 312
400 South Orange Avenue
South Orange, New Jersey 07079
Telephone: 973 275 2856
Email: ben.beitin@shu.edu

Researcher Contact Information:

Kwamia N. Rawls, M.S.Ed., Ed.S.
Seton Hall University
Department of Professional Psychology and Family Therapy
Jubilee Hall 309
400 South Orange Avenue
South Orange, New Jersey 07079
Telephone: 973 761 9451
E-mail: kwamia.rawls@student.shu.edu

Appendix E: Recruitment Letter

Dear Prospective Participant,

Our company has been contacted by Kwamia N. Rawls, a doctoral student in the Marriage and Family Therapy Program in the department of Professional Psychology and Family Therapy at Seton Hall University, South Orange, New Jersey. She is in need of your help. Ms. Rawls is searching for participants for the research she is conducting for completion of her doctoral dissertation.

Explanation of the research and duration of participation

The objective of this study is to identify the most important factors faced by expatriate families during their transition to a foreign country. The identification of these factors may help therapists, psychologists, schools and sponsoring companies develop better supports and resources for expatriate families in transition. Participants will complete a short, self-report, demographic form (recording general background information such as the participant's gender, race, country of origin), prior to conducting the interview. A semi-structured questionnaire will guide the researcher's interview. The interviews will take approximately 60-90 minutes and will be scheduled based on the availability of each participant.

Confidentiality

Before the initial interview all participants will be informed about safeguards to confidentiality and will be asked to sign a detailed letter regarding confidentiality and consent to participation. No participant's name or identifying information will be used in analyzing or reporting the content of the study during or after the study. All material gathered during the interview process will be confidential. All audiotapes and material will be coded with letters and numbers (no names), transcribed data will be stored on a password protected USB memory key and locked in a file cabinet that only the researcher, Ms. Kwamia N. Rawls can access.

Voluntary participation in the study

Participation is entirely voluntary. A participant may withdraw from the study at any time, without penalty or obligation.

Anonymity

No identifying information regarding the participants will be recorded, so that one will be able to link the data to any individual.

Criteria for participation in the study

Participation is limited to married couples with children that have been relocated for work purposes to a foreign country by their employer. In addition, all participants are required to have lived in the host country for no less than 12 months. All participants must be fluent in English, the language in which the research will be conducted.

Approval of this research study

The Seton Hall University Institutional Review Board for Human Subjects Research has reviewed and approved this research study. The IRB has acknowledged that the research

procedures within this study adequately safeguard the privacy, welfare, rights and civil liberties of the people who will participate in this research.

Request

Your voluntary participation is needed. Based on the aforementioned requirements if you are willing to participate in this study, please fill in your contact information on the attached form and email it directly to Ms. Kwamia Rawls at Kwamia.rawls@student.shu.edu. Ms. Rawls will then contact you by email.

If you have any questions or need additional information regarding this study or the researcher please contact:

Kwamia N. Rawls, M.S.Ed., Ed.S. (Researcher)
Seton Hall University
Department of Professional Psychology and Family Therapy
Jubilee Hall 309
400 South Orange Avenue
South Orange, New Jersey 07079
Telephone: 973 761 9451
E-mail: kwamia.rawls@student.shu.edu
or

Ben Beitin, Ph.D., L.M.F.T. (Dissertation Advisor)
Seton Hall University
Department of Professional Psychology and Family Therapy
Jubilee Hall 312
400 South Orange Avenue
South Orange, New Jersey 07079
Telephone: 973 275 2856
Email: ben.beitin@shu.edu

Appendix F: Contact Information Form

Thank you for your interest in volunteering as a participant in this study regarding the transitions of expatriate families to living in a foreign country. Please fill out the contact information below and email it promptly to the researcher, Kwamia N. Rawls at: Kwamia.rawls@student.shu.edu. After your contact information is received, the researcher, Kwamia N. Rawls will contact you with more information regarding the study.

Contact Information:

Name: _____

Mailing Address:

Phone Number(s): Please write only the number(s) you would like to be reached at:

Home	_____	Country and city	_____
Mobile	_____	Country and city	_____
Other	_____	Country and city	_____

Email: (Required as the researcher will contact you first through email)

Please indicate what time of day (from your calling location) that is best to call you:

You will be contacted through email within 1 day from receipt of your contact information. Through email, a phone call appointment will be scheduled. If you have any questions, please contact the researcher directly.

Thank you for your interest in participating in this research.

Kwamia N. Rawls, M.S.Ed., Ed.S. (Researcher)
Seton Hall University
Department of Professional Psychology and Family Therapy
Jubilee Hall 309
400 South Orange Avenue
South Orange, New Jersey 07079
Telephone: 973 761 9451
E-mail: kwamia.rawls@student.shu.edu

Appendix G: Letter for Participant's informed consent

Dear _____

Kwamia N. Rawls (researcher) is a doctoral student (Doctor of Philosophy, Ph.D.) in the Marriage and Family Therapy Program in the Department of Professional Psychology and Family Therapy at Seton Hall University, South Orange, New Jersey, USA. The researcher is requesting your participation (participant) in this research study that is being conducted to fulfill the degree requirements.

Purpose of the research and duration of participation

The objective of this study is to identify the most important factors faced by expatriate (people who live in a country but are not citizens of that country) couples and their families during their move to a foreign country. The identification of these factors may help therapists, psychologists, schools and sponsoring companies develop better supports and resources for expatriate families during such moves. Your participation in this research will consist of one interview that will be about 60-90 minutes. You will be allowed to review a written summary of the interview to make corrections, if needed, which may require about 30 minutes.

Procedures

Only married couples with children who have been relocated for work purposes to a foreign country by their employer will be able to participate in this research study. All participants are required to have lived in the foreign country for no less than 12 months. All participants must be fluent in English.

Individual interviews of married couples will be conducted (children will not be interviewed). Before conducting the interview, the participant and researcher will spend a few minutes talking and getting to know each other. Next the researcher will ask the participant to fill out a demographic form recording general background information about them (e.g. gender, race, country of origin). This information will be immediately coded with a number/letter combination. The researcher will then interview the participant through the use of numerous open-ended questions. Each participant will be asked the same questions.

The interview will be audio taped and some general hand-written notes may also be taken by the researcher. Interviews will be scheduled based on the availability of each participant. They will occur at a place that is agreed upon between the participant and researcher and to insure confidentiality they will occur in a comfortable atmosphere, such as the participant's home, public library or a reserved private counseling room at Seton Hall University.

Following the interview, the research will make a written summary of the interview that will be provided to each participant for review so they can make corrections if necessary.

Data Collection and Questionnaires

Data from the interviews will be collected on a questionnaire and the researcher will also take hand-written notes. Questions will be focused on the experiences of the participant and their

family's move to and experience living in a foreign country. Three of the questions that will be asked are provided below:

1. *Was the acquisition and competency of a new language an issue for you or your family? Please explain how this did or did not affect your transition and experience).*
2. *Please describe what actions you took to prepare yourself and your family for the move.*
3. *Please describe any outside supports you had during this process.*

Participants will be allowed to ask the researcher to clarify questions if necessary so that complete and accurate responses can be provided.

Voluntary participation in the study

Participation is entirely voluntary. A participant may withdraw from the study at any time, without penalty or obligation.

Anonymity

No identifying information regarding the participants will be recorded, so that one will be able to link the data to any individual.

Confidentiality

The identity of all participants will be protected by the use of number/letter codes instead of names or other identifying information on audiotapes, questionnaires and transcripts. No participant's name or identifying information will be used in analyzing or reporting the content of the study, during or after the study. All material gathered during the interview process will be confidential. All identifying information will be removed from the transcripts. Quotes of statements from the interviews may be used; however, no names or identifying information will be associated with these statements. The researcher will do all interviews and transcription. Transcribed data will be stored on a password protected USB memory key and will be kept, with all other data, in a locked file cabinet in the researcher's office. No other researchers or persons will have access to the cabinet.

The dissertation advisor and faculty committee, who oversee this dissertation process, will have access to only the transcriptions (i.e. the transcription of the interview, identified by code number and letter). No identifiable personal information will be made known. Results of this study may be published and may be used in related professional presentations regarding expatriate families and transitions.

Alternate Procedures

There are no alternative procedures available to conduct this interview based research study.

Anticipated risks and discomforts as a participant

Given the nature of this study there are no foreseeable physical risks or discomforts. The interview questions may lead to new levels of insight or self-awareness. There is a possibility that some participants may experience minimal discomfort in discussing aspects of their personal lives.

Benefits for participating

No participant will receive any monetary or material compensation for participation in the study. Participants in similarly conducted studies have reported benefits such as feeling valued for sharing their knowledge, and helpful for having provided useful information that may benefit others. Participation will provide other expatriate families with experience-based information that therapists, psychologists, schools and companies can access to help support decisions regarding international assignments.

What to do in case of discomfort

If a participant should experience any level of discomfort at any time through out the process the researcher should be contacted directly, either in person, by telephone, e-mail, or postal service. Any participant experiencing discomfort should seek immediate mental-health services from their local hospital emergency center. Alternatively, a participant experiencing discomfort can obtain mental-health resources and support from the New Jersey Psychological Association (973-243-9800; www.psychologynj.org/), the National Association of Social Workers New Jersey Chapter (800-932-0004; www.naswnj.org/) and/or the New Jersey American Association of Marriage and Family Therapists (609-771-2119; www.njamft.org/).

Approval of this research study

The Seton Hall University Institutional Review Board for Human Subjects Research has reviewed and approved this research study. The IRB has acknowledged that the research procedures within this study adequately safeguard the privacy, welfare, rights and civil liberties of the people who will participate in this research. For answers to questions regarding the research process related to this research study the IRB chairperson may be reached at (973) 313-6314.

Questions

If you have any questions or need additional information regarding this letter of consent, the research or the researcher you may contact:

(Researcher)

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Appendix H: Informed Consent Form Agreement

I, _____, have read the information regarding informed consent for this particular study. I agree to participate in this study and I realize that I may withdraw from participation at any time without penalty or obligation.

Consent to Audiotape

I agree to have my interview(s) audio taped for purposes of transcription and accuracy. These tapes will contain no identifying information and will be identified by letter/number codes. These tapes shall only be listened to by the researcher and will be stored in a locked filed cabinet in the office of the researcher. These tapes will be kept for 3 years and then destroyed.

(Circle one) Yes No

Dear participant,

Thank you for your consent to participate in this study. Please sign and date both copies of this Informed Consent Form. Please return one copy to me, the other copy is for your own records.

Participant's Signature

Date

Researcher's Signature

Date

Appendix I: Script for phone contact with prospective participants

Researcher:

“Hello (insert name of Prospective Participant),

I’m Kwamia Rawls a doctoral student in the Marriage and Family Therapy Program in the Department of Professional Psychology and Family Therapy at Seton Hall University. I am requesting your participation in my research study that is being conducted to fulfill the degree requirements for my Ph.D.

The objective of this study is to identify the most important factors faced by expatriate (people who live in a country but are not citizens of that country) couples and their families during their move to a foreign country. The identification of these factors may help therapists, psychologists, schools and sponsoring companies develop better supports and resources for expatriate families during such moves. Your participation in this research will consist of one interview that will be about 60-90 minutes. You will be interviewed separately from your spouse. You will be allowed to review a written summary of the interview to make corrections, if needed, which may require about 30 minutes.

Do you have any questions about what I have said or about the informed consent? If no, then, would you like to participate in the study? “

If the Prospective Participant answers “No”, the Researcher will respond, “Thank you for your time and interest”. If the Prospective Participant answers “Yes”, the Researcher will respond with the following:

“I would now like to schedule a place and time for our interview. In order to make sure you are most comfortable and that the interview is confidential would you prefer to be interviewed in your home, at your town’s local library or at private room at Seton Hall University in South Orange, New Jersey?”

(After agreeing on the location the Researcher will list 3 days of availability with flexible time in the morning, afternoon or early evening. After agreement in date and time the researcher will confirm the agreed upon interview date and time).

“Thank you for scheduling with me today. I will send you out an email confirming our scheduled meeting time. In the case you have to reschedule this interview or need to contact me with questions or concerns, I may be reached through my email address kwamia.rawls@student.shu.edu or at my Seton Hall University office, number 973 761 9451”.